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## ABSTRACT

The search for a new head of an independent school is complex and requires matching the values and characteristics of the school with a qualified candidate. The difficulty and importance of this task is often underestimated by those seeking new school heads. A mistake in choosing an administrative head can result in failure to secure effective leadership for the school. Other challenges independent schools face also impede the process. As costs of running an independent school rise, fund raising is an increasingly important task for school heads. Fewer school-age children, more demanding parents, and changing demographics are also factors that must be considered in choosing a school head. This guide provides information to assist search committees in hiring a new school head. Chapter topics include the following: leadership in independent schools; hiring a search consultant; preparing the board for transition; selecting a search committee; starting the process; legal and ethical concerns in the search process; identifying, recruiting, and evaluating candidates; interviewing semifinalists; checking references, planning campus visits, and narrowing to final candidates; making the choice; and achieving a successful transition. Following a list of National Association of Independent Schools principles of good practice for member schools, seven appendices provide additional guidelines and samples of documents used in a search. (JPT)

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# The Search Handbook

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# A

Step-by-Step

Guide to

Selecting the

Right Leader

for Your School



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NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS

# The Search Handbook

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Step-by-Step

Guide to

Selecting the

Right Leader

for Your School

**Barbara Gilvar**  
Editor

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# Introduction

T

he search process for a new head of school is more complex than most people recognize. It is critical to match the values of an organization and the

values of the individual seeking a headship. But understanding the significance of a school's traditions, its organizational culture and its relationship to different leadership styles is far more important and difficult than most people realize at first. That mistake has resulted in many failed partnerships. Search committees are right to be anxious as they embark on their mission.

Searches are also affected by the challenges facing independent schools today, challenges that have increased dramatically in complexity in recent years, fundamentally altering the work of boards of trustees and of heads. As costs have risen, fundraising has become more of a necessity for all school heads. Today there are fewer children of school age, a faltering economy, parents who choose schools more carefully (and monitor their performance), and new populations considering independent schools. Marketing and retention, as well as curriculum development, require knowledge and leadership. The declining tenure of heads of schools, and the consequent disruptions for the institutions and individuals involved, is one result of the struggle to understand the impact of these changes on independent school leadership.

We begin this book with the recognition that a head of school faces new challenges today, and that these demands have a direct effect on the way search committees must think about the search process. The role of the board has also evolved. Boards today need to be more knowledgeable about their own institution, more aware of national trends and improvements in school management, and more familiar with developments in curriculum in order to support the institution and its head in a changing environment. Much of a search's success will depend on the strength of the board.

In order to be an effective guide to the search process, this book addresses the range of issues that affect the leadership of independent schools today. New definitions of leadership and head/board partnerships are evolving. As a board launches a search process, it must begin with conscious stock-taking and goal-setting, which will influence all the steps that follow.

With the selection of a new head, attention must turn to the thoughtful preparation of short- and long-term goals and priorities for head and board. While a thorough search process will have begun setting goals and priorities, much more is learned during the search period, and this knowledge can provide a head and board with a foundation for their work together.

As we prepared this book, we proceeded with the assumption that a search process is a series of opportunities. When boards and search committees use those opportunities to reflect and articulate goals, they begin to define the required leadership experience the school needs and they begin to strengthen the school as the search goes forward. This stronger organization, which gets to know itself better through the search process, will ultimately make wiser, more informed choices about its future leadership.

The sense of that opportunity for strengthening the organization through the search process has been an underlying foundation for the design of this book. The themes that recur through these chapters, within the context of a specific subject or phase of the search process, serve to emphasize that assumption.

We also recognize that no two searches are alike. They vary enormously, depending on the current needs of the institution, the size of the school, its mission, its geography, the students served, the leadership of the board, and whether a consultant assists and what services that consultant provides.

We hope that this book will provide a philosophical overview, as well as step-by-step details about the various phases of a search, so that a search committee can begin with a broad understanding of the elements of a thorough and thoughtful process. With these insights a search committee will have a framework within which to construct a process that works for their institution.

The contributors to this handbook are chairs of search committees and/or boards, professional search consultants, school heads, and other leaders in independent education. Each is a successful practitioner in his or her own field and has developed a philosophy or method of approaching and conducting searches. While there are many themes that those of us involved in the search process – and in writing this handbook – agree about, there are other issues about which we differ. To retain the individual perspective of each contributor seemed important. To convey other philosophies, thoughts, methods or alternatives to the reader, editorial inserts outline additional options.

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Boston, Massachusetts, 1992

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# Leadership in Independent Schools

L E A D E R S H I P

I

n the United States, independent schools have their origins, for the most part, in the post-Civil War period, which saw the rise of an industrial economy and the arrival of thousands of immigrants. These two events created a society, in New York and New England particularly, of the very rich, the very poor, and a middle class that aspired to riches.

Schools to serve the rich were places of privilege that provided an academic education to prepare students for colleges or universities. Their students were the sons and daughters of wealthy business owners who had the financial security – and therefore the time and opportunity – to pursue the intellectual and social life that characterized the schools and gave them the reputation of being elite.

Not all American schools were schools for the rich and the white, however. Before the Civil War there were small, private neighborhood schools for African-American children in some northern cities, as well as some in the South. In the post-Civil War period, independent schools for African Americans focused on preparation for industrial work; schools with a stronger academic focus developed in the 20th century.

In spite of major changes in American society and in the makeup of independent schools, the perception of elitism persists today. In fact, many independent schools are now far more pluralistic in program and population than are neighborhood public schools, which tend by their very definition to be homogeneous.

American society has changed profoundly in the last century and is continuing to change at a rapid rate, raising challenging questions for the heads and boards of the future. While some independent schools have become pluralistic in their student population, faculty, and administration, other schools are still facing those challenges.

A recent, distinct and far-reaching change for the country and for all schools, including independent ones, is the large number of immigrants from Asia and Latin America, many of whom have settled in the western and southwestern parts of the United States and whose traditions may not include independent education for their children. According to the Educational Research Service, a million people a year arrive in the U.S. from Asia and Latin America. By 2015, one of three people in the U.S. will be a person of color. Boards and heads need to think about what this means for independent schools.

Another change has overtaken society: over 60 percent of mothers of children under age 5 are now in the work force. Schools that are already coping with increasing demands on their

### **Leaders of today's independent schools are faced with incredible challenges.**

programs and time can expect that pressure to continue. Before school, and after school, children need supervision and care. During school they need ever-increasing instruction, not only academically, but in basic values, moral issues, courtesy and general support in areas that once were assumed to be the responsibility of home and church or synagogue.

In the late 20th century, boards and heads must grapple with the issue of who can afford independent schools. As costs continue to rise and incomes do not keep up, the issue of affordability is central to success at one end of the scale – and to survival at the other. Clearly, leaders of today's independent schools are faced with incredible challenges.

### The Evolving Role of the School Head

**T**he history of independent school leadership is filled with powerful individuals imbued with high standards and a commitment to teaching academics to the young, as well as to developing their moral character. During the last quarter of the 19th century some of the most respected girls' schools were founded by women whose strong intelligence and entrepreneurial talents were well suited to education and whose opportunities were otherwise severely limited by society's expectations for women. The men and women who were the headmasters and headmistresses of that time were people who influenced the lives of thousands – and their influence is still felt today in the schools they founded.

One of the anomalies of the past 30 years is the steady decline in the number of women who head schools today. This can be attributed to several things, including increased opportunities for women in other fields, the perception among boards that "students today need a strong man," student unrest in the late '60s and '70s, the growth of coeducational schools, and the perception that men are more effective fundraisers as schools face ever growing needs for new funding to balance rising costs – despite evidence from NAIS research, which reveals that 64.3 percent of fundraisers in independent schools are women. Search committee preconceptions may set up subtle barriers as well. Whatever the reasons, there has been a decline in the number of women who head schools since the early 1950s, one of many issues schools need to examine.

### The Evolving Role of the Board

**W**hether the head is a woman or a man, the quality of the leadership significantly affects the individual quality of the school during the head's tenure. In their beginnings, most independent schools were headed by strong, central individuals who frequently owned the institution. Boards of trustees, as we know them today, are relatively new and developed their strong identities during the 1920s. In some cases, founding heads had wanted to perpetuate their schools after their deaths; in others, the need for a broader base of support as schools grew made boards a necessity. In any case, at their inception, boards were organized around the head, who was the authority, the manager, the head teacher and the final arbiter of all issues.

As institutions became more complex and external circumstances placed additional demands on heads of schools, the role of the board evolved. Today the most effective boards are more knowledgeable about education and their institution and play a more significant role as a resource and a partner to a head.

### **New Dimensions of Headship**

**T**oday, heads are still expected to be powerful CEO's, and the standards and personality of the head still determine the quality and spirit of a school. However, schools and their communities have increasingly complex needs that alter the definition of a head's role. And, in an era when there is real ambivalence about authority, the style of leadership has been changing steadily so that now the head delegates authority to others – the senior administrators, who maintain the structure and order. Today a head's effectiveness depends upon the effectiveness of the people he or she appoints. The real power of the head is derived from shared decision-making with leaders of the faculty and administration. The successful head in the 1990s is the person who can balance the institutional needs for a powerful central figure with the need to empower the senior administrators and faculty leaders to carry out the educational and non-academic policies of the school, and one who understands the board's role as an important resource.

With changing times and cyclical economic uncertainties, the head of the '90s is spending increasing time in fund- and friend-raising activities. Many of these are carried on outside

### **The standards and personality of the head still determine the quality and spirit of a school.**

the school so, for practical as well as philosophical reasons, the infrastructure of leadership has to be strongly in place since the head is frequently away from campus. During the last 15 years or so, being a head of school is no longer simply being the best teacher, the "head" master or "head" mistress. The demands of the outside community, the identification, cultivation and care of trustees, fund- and friend-raising, recruiting teachers, and managing finances have made headship much closer to the role of college president combined with the corporate CEO model. And yet, within the schools, the head is expected to be accessible, wise, compassionate, firm, well-versed in educational developments, a strong speaker, and knowledgeable about all students, faculty, administration, maintenance, staff, parents, alumnae, major donors, and even grandparents!

There are those who say that finding the balance between the private and public demands of a head's life is a high wire act *extraordinaire*, and it may be. It also holds the greatest potential for affecting the common and individual good, for enjoying true autonomy while working with a group of like-minded professionals, and offers the opportunity to grow into one's best self and to keep growing. There is no profession quite like it.

**Perhaps the word "calling" comes closest to an accurate description of being a head of school.**

Perhaps the word "calling" comes closest to an accurate description of being a head of school, as it embodies the nobleness of purpose, the total commitment and the implicit goodness of the enterprise. As your search begins, keep these demanding – and rewarding – qualities of headship in mind.

## Should We Hire a Search Consultant?

P R O F E S S I O N A L  
H E L P

**E**

very year approximately 15 percent of the nearly 1000 schools in the membership of NAIS face a change in head-

ship. Increasingly in the last ten years schools have sought professional help in the process of finding a new school head – and there has been a proliferation in the number of search consultants offering such services. Therefore boards of trustees embarking upon the search process must decide whether to hire a consultant or to undertake the search themselves. Clearly, schools can conduct highly successful, well-organized and effective searches in-house. Whether they decide to employ a consultant or not, school leaders must be willing above all to make a serious commitment of time and energy to the process.

Should a school engage the services of a consultant to conduct the search for a new head? The answer to this important question is "It depends." There are numerous factors and conditions for the board to consider in making a decision on the methods to employ in the search process upon which they are about to embark. Because the

selection of a head of school is one of the most important responsibilities of a board of trustees, it is essential that all options be fully considered before a decision is made. The well-organized, carefully planned search has the greatest likelihood of success. Therefore the process to follow is crucial.

### Pros and Cons of Using a Consultant

**A**n experienced and well-organized search consultant can make the entire process of selecting a head of school faster and smoother. An experienced and knowledgeable consultant, carefully selected, can be of great assistance in guiding the process and bringing a broad perspective as well as in providing specific services. The consultant can undertake much of the planning, marketing, candidate identification and screening, and assistance to the search committee in the areas of interviews, reference checks, and school visits.

An effective search process is based on a strong search committee whose members are clear about the present state of the school, the priorities of the job for a new head and the board's role in selection and transition. A consultant often is equipped to lead the search committee through a series of steps in assessment and process planning to be sure the whole school community itself, as well as the committee, is prepared to undertake the complicated procedures of a search. He or she usually will assist the committee in the creation of descriptions of both the school and the position of head. A consultant can help by providing objectivity and the experience of effective strategies in other searches.

A consultant can undertake marketing procedures necessary to make sure the opening is well-publicized. He or she may place ads in appropriate publications, send out notices of the opening and request suggestions from appropriate sources. A consultant will set up a time frame for the search, from the announcement of the opening to the appointment of the head, and will keep the search committee on track along the way.

The identification of potential candidates is possibly the search consultant's most significant role. It takes considerable legwork and organization to screen résumés and follow up on recommended candidates, as well as to identify and contact qualified people to seek their possible level of interest in the position. This is a time-consuming service involving phone interviews, paperwork, and personal meetings. A consultant must gather the résumés of candidates and provide dossiers to the committee for its consideration. Once candidates for interview have been identified, a consultant may assist in scheduling appointments as well as providing background and possibly even attending the interviews.

### **A consultant will set up a time frame for the search will keep the search committee on track along the way.**

It should be noted that different search consultants have very different operating procedures. Most prefer to work in a full-service mode, from the beginning to the end of the process. But there are some consultants who will work with a school in a more limited way, offering general guidance. The school must decide the types of assistance desired and ascertain the operating procedures of a potential consultant during the interview and selection process.

There are circumstances in which a school might find the assistance of a search consultant especially valuable. An outside professional can help to bring all groups together to determine the needs for the future leadership of the school. If a school is particularly interested in recruiting women and people of color as candidates, a national consultant may provide access to a network of such individuals.

On occasion a search consultant may be retained to undertake all reference checks on behalf of the committee. In some cases the consultant may also work with the school and the new head to effect a smooth transition. Certainly, a consultant will meet with the committee on many occasions throughout the length of the contract and should be readily available to consult by telephone as needed. A consultant may serve an important function as intermediary between the candidate and the committee and can offer support to the chair and the committee members throughout the process.

Search committees need to know that the cost of contracting with a search consultant can be high; it may range from a few thousand dollars to over \$30,000. In addition, the school is responsible for expenses incurred during the search, both those of the consultant and of the candidates. A search conducted by a full-service consultant can cost \$50,000. At those prices, many schools may not wish to spend their limited funds on consulting services. *(A school that chooses not to hire a consultant will, of course, incur costs also. See the budget section of Chapter 5 for details. — Ed.)*

A school that chooses to undertake a search itself must be sure that systems are in place for the search committee to operate efficiently and effectively. The members of the committee must understand that they are responsible for school and job descriptions, marketing procedures, candidate screening, clerical response and organization, interviews, possible school visits, extensive reference checks, financial management and contract preparation, negotiation and transition. It is a complicated and time-consuming activity, requiring search committee members who are willing to give large amounts of time to accomplish all the detailed tasks as well as to meet together to chart the course of the search. Mistakes are made when search committees are not well-organized or do not understand the necessity for an orderly process. It is also essential that the chair of the search committee be a strong leader and a good systems person with an eye for detail and delegation. Above all, the chair must have the time to undertake this responsibility.

It is important that the search committee retain control and vital involvement in all aspects of the search and not turn the entire responsibility over to a consultant. If the search committee is not fully involved, they run the risk that the consultant may not be fully cognizant of their wishes. There may also be a loss of personal investment on the part of the committee.

### How Do We Decide Whether or Not to Use a Consultant?

**F**irst, the board must realistically assess its needs, energy, availability, and financial picture. There must be a group of highly committed trustees to staff the search committee in any case, but if the decision is to go it alone, these individuals must make the commitment to carry out the tasks themselves in a timely and organized fashion.

A board may decide to interview several search consultants as part of the decision-making process. These individuals will make presentations to the board or the search committee detailing their methods and fees. There is no cost to the school for this interview. (For lists of search consultants, contact the NAIS Department of Administrative Services.)

### What Should We Ask a Prospective Consultant?

**T**he search consultant should be invited to make a presentation on obvious matters of methodology, fees, process, and experience. There are various additional questions that search committees should consider asking a potential consultant:

1. How many searches are you engaged in at this time?
2. How many searches will you undertake at any one time? (This question is crucial; consultants who over-extend themselves cannot provide timely services. In general, a single consultant should not undertake four or five searches concurrently. Of course, the support services that the consultant has available are important in these considerations.) In the case of a search firm, the committee should ask: Are you the individual consultant who will be working directly with our school?
3. Did you lead any searches which did not result in placement in the first year? If so, why did this happen and what was your role in the continuation of the search?
4. What is your track record about placed heads? Have any left within one or two years? If so, why?
5. What is your network of women and candidates of color? How many women and candidates of color have you presented in searches? How many have you placed in your searches in the past three years?
6. What resources would you bring to the search that we could not provide for ourselves? What unique resources do you bring?
7. What is your point of view about the use of interim heads?

In addition, search committees should request from the consultant candidates a list of the names of search committee chairs from at least three recently completed searches. These references should be carefully checked as to the level of satisfaction with the consultant's services. Ask the chairs if the consultant was well-organized and timely, and whether he or she delivered the services promised without prodding. Reference checking should be very thorough, not only because of the significant amounts of money involved but also to ascertain the flexibility, responsibility and reputation of the consultant under consideration.

If the consultant answers "yes" to questions 3 or 4, those situations should be explored with a call to the search committee chair at the school in question to ask if the consultant's work contributed in any way to the unsatisfactory result. (Refer to Appendix A for the NAIS Statement of Principles of Good Practice for School Search Committees and Search Consultants.)

If the board decides to hire a consultant, there are important considerations to keep in mind. A contract should be drawn up that clearly delineates the scope of services to be performed, the fees and expenses, and the responsibilities of the consultant for reports and time lines. (Many consultants will present their own contracts; these should be reviewed by the school's legal counsel.) The school must be clear about its expectations of the consultant and be open to his or her suggestions or identification of potential problems.

### Resources for Schools That Run Their Own Searches

For sample advertisements, letters, and other materials needed to conduct a search, please consult the Appendices beginning on page 101. In addition, NAIS, through the Governance Through Partnership initiative, provides basic services to assist a school in charting the course of its search. Information on this service is also provided in the Appendix. For further assistance, the NAIS Director of Administrative Services is available by telephone to convey information on all aspects of the search process to trustees, heads, and consultants.

The search committee must communicate with the consultant if they are displeased or concerned at any point in the search. It is essential to remember that it is ultimately the responsibility of the school, not the consultant, to make a wise choice of a new head.

No matter what the decision about the use of consultant services, the selection of a head is one of the most important aspects of school governance. Above all an effective search process requires commitment and an inclusive process. It is hard, time-consuming work, but a well-conceived and well-organized search is a healthy growth process for the school. The use of a consultant does not automatically guarantee success; the first responsibility lies within the school.

# Preparing the Board for Transition

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## First Steps

electing a head of school is one of the most important duties of a board of trustees. The board can determine the

focus and strength of the school during the search process, maintain morale and operations during the transition, and lay the groundwork for success in the new head's period of service. While some issues must await new leadership at the head's level, some matters can be – indeed must be – addressed while the search progresses.

A turnover in leadership can bring elements of sadness, anxiety, and unhappiness about change to a school community. Those feelings need to be acknowledged. Then, the health of the organization is to be found in looking forward and reaching together toward future goals.

A search is an important occasion for a school community. The dictionary has two interesting definitions of the word "occasion" and both are relevant here. The first definition is "an accidental opportunity," and that might be your school's situation. Perhaps the change was not accidental, but planned. Then the second definition applies: "a state of affairs which makes something else possible."

In either case, a search is an opportunity and, while it may seem to be a major undertaking, the process can have very positive results when a board approaches it as a time to shape the future of the school. A search is a lot of work, but it is important work and with a little planning you can maximize opportunity and avoid costly mistakes.

Some thoughtful planning can guide you so that two important things take place: first, that people have confidence in the search process, and second, that you achieve the kind of results you want for your school.

The leadership of the board chair is critical to making a transition from head to head as smooth as possible, with minimum disruption of ongoing education. A board chair who conveys a positive tone will influence the mood of the entire campus. (See Appendix B.)

### Assessing the Present

**S**earches have many potential points for failure, and the first is right at the beginning of the process. The natural impulse is to be anxious about the impending change and to want to get it over with as soon as possible. That, however, could lead to a selection with unhappy (and long-term) consequences.

Healthy organizations adapt and evolve over time. The start of a search process is the time to think about those changes and how they influence the role of future leadership. A change in leadership is a significant event in the life of an organization, a natural and critical time to assess carefully before moving ahead. Taking the opportunity to describe the school as it is today and to rearticulate the fundamental beliefs that have consistently influenced the institution are first steps in the search process. This provides a solid

**Healthy organizations adapt and evolve over time. The start of a search process is the time to think about those changes and how they influence the role of future leadership.**

foundation for assessing strengths, analyzing where improvements are needed and defining the role of the next head. The process of reflection and renewal provides an informed basis for defining the priorities and the actions of the board and the search committee. They will be able to shape a thoughtful search process because they have articulated the organization's direction, goals and beliefs.

### The Goals of Initial Planning

**A** search process that fundamentally addresses all aspects of the organization, takes the time to reflect on the most positive future possible, and brings those understandings back to the work of the search has the following benefits:

- There is positive planning rather than a reactive response
- Instead of relying on a description of what was needed in the last head search, criteria are defined for the present and the future
- New goals are articulated, some of which go into the description of the role of the next head, and others which can be addressed by the board and administration while the search proceeds
- The board is better prepared to assess its role, its effectiveness, and its priorities
- The goals help a board define a vision and what is needed to make it real, leading to clarification of its own work and a keener sense of the leadership required from a new head.

### Building on Prior Planning

**M**any occasions already may have prepared a board for its reflections on the future of the organization and the role of the head. Some of them are:

- A thoughtful long-range planning process
- A comprehensive self-study that produced new learning
- A board retreat to reexamine, rearticulate and renew the school's mission in preparation for long-range planning
- A major capital campaign
- Planning major renovations or new facilities
- Potential significant changes, including anything that might change the configuration of the school.

Any one of these opportunities for serious reflection, analysis, renewal, and direction-setting will have helped to prepare an institution for a change in head. However, since none of the events focused specifically on the head transition, a session devoted to the goals, opportunities, and criteria of headship at your school will significantly inform the search process.

### What If We Didn't Plan?

**I**f an institution has not recently had an opportunity to deal thoughtfully with key issues, it is even more important to take the time now. Choosing a head without a clearly defined direction is a recipe for disaster. The time required can be a well planned one- or two-day retreat that produces direction for the search and priorities for the board. A board that has prepared and organized its thoughts and its priorities for the search and the future is a board in a much stronger position to attract the best candidates and to understand the dimensions of the criteria required. It is also a board better prepared to create a strong and knowledgeable board / head partnership. In the interim the board will be better able to assist the school through the transition.

The benefit of a thoughtful search process is a theme that will recur throughout this book. Its importance derives from the understanding and experience of chairs of search committees, board chairs, heads of schools, and search consultants who recognize the complexities of leadership, of change, and of organizational vitality and success.

### The Position Description

**A** position description should sensitively describe the strengths of the school and the key areas it must address. The strengths, including a strong mission statement, will reach out to potential candidates who can identify with the school's goals. Outlining the challenges lets sources and prospective candidates understand the dimensions of the job. The best candidates for a particular school can identify with its goals, bring the commitment, experience, and ability to lead to the accomplishment of those goals, and be ready for the size of the job. (See Chapters 5 and 6 and Appendix C.)

A position description is also a marketing tool and an update on events at the school. When schools encounter hard times, rumors are plentiful and tend to remain long after remedies have begun working. A position description offers the opportunity to clarify perceptions about your school.

A carefully articulated position description provides:

- A better understanding of strengths
- An opportunity to confirm that you agree on priorities
- A clear statement of future goals
- A thoughtful definition of the head's role
- A guide for your recruiting efforts
- A basis for evaluating potential candidates
- The foundation for future work.

# Selecting a Search Committee: The Structure for Success

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## Why Searches Fail or Succeed

he search process itself can either fail or succeed over varying tenure spans, some as short as eight or even fewer months, others as long as 20 or more years. Such negative or positive outcomes depend upon many factors. Perhaps the most important exists when a headship change is announced and is based on how competently the board of trustees is positioned to manage change. The board of trustees governs the degree of failure or success when heads change.

There are, and probably always will be, many who are willing, even eager, to serve as heads of schools. Whether or not a person is able or whether or not that person is right for a school at a particular time in the history of the institution are questions that every search committee seeks to answer.

Almost without exception, boards of trustees of independent schools are composed of men and women of good will whose mission is to strengthen and improve the schools they serve. Governance problems inevitably occur when trustees falter and lose focus as to what constitutes the institutional good and what is necessary to achieve it.

The search process in particular requires significant time, effort, judgment, sensitivity, and attention to detail. When any of these is slighted, the end result can suffer.

The chair of the search committee of one school, after an especially lengthy search that had failed to produce what committee members felt to be many outstanding candidates, is reported to have said to a colleague after the announcement of the head-elect, "We were all tired of it, so we named the candidate we disliked least." That appointment failed in the first year.

### Key Hazards

**A hazard:** Insufficient attention to building a strong board of trustees.

**A solution:** Knowledgeable independent school leaders who believe responsible trusteeship requires knowing at all times who clearly are worthy prospects to serve as the next two or three board chairs and who are the most likely candidates to fill the next six vacancies on the board.

**A hazard:** Lack of stability and/or continuity on the board of trustees.

**A solution:** Experienced search coordinators endorse the continued tenure of the chair of the board of trustees for at least the first full year of the incumbency of a new head. The succeeding chair could then be either the chair of the search committee or an active member of the committee that recommended the appointment.

**A hazard:** Inadequate trustee training and/or development.

**A solution:** All board members should understand and support the school philosophy and mission. In addition, trustees and the head should agree on both short and long-range goals for the school and should have collaborative accord on existing and future strategic plans.

**A hazard:** Crumbling cohesion about board decisions. Trustees who act unilaterally, lobby for particular constituent groups, or breach board confidentiality sap institutional and individual vitality.

**A solution:** Trustees need to separate their trustee role from their other interests. Each individual trustee has an obligation to the well-being of the institution and to its collective spirit.

**A hazard:** Deficient or inappropriate communication. When germane information is not transmitted in a timely fashion, misinterpretation and/or misinformation can cause damage. An anonymous sage noted, "Silence writes its own script." Far too many unnecessary problems result from improper communication.

**A solution:** Regular updates on the search process and timing will reduce anxiety.

A search committee that approaches its obligations with all members and all other trustees fully informed of these potential pitfalls, and is determined to avoid them, begins its responsibilities from a position of strength.

### Structure for Success

**T**he search committee likely to be most successful is the one that has a clear vision of the mission and purpose of the school and that has identified generally the personal characteristics and professional qualifications it is most important to ascertain in the next head. More specifically, search committee members should acknowledge the virtues of a generally accepted trustees/head territorial clarity and balance of power, as well as the desirability of a collaborative and collegial combined leadership by head and board. Finally, the search committee should recognize that uncertainties inevitably exist in every school constituency about a change in leadership and, therefore, that specific and sufficiently frequent communication about the progress of the search is essential. It is also critical that the committee members understand from the outset the importance of maintaining complete confidentiality regarding committee deliberations.

It is at least equally important that search committee members, if not the whole board, should be aware early on of any potential impediments or problems candidates may perceive that could have a negative impact on the search. The 1989 earthquake in San Francisco, for example, caused candidates to withdraw from searches in progress at a number of California schools at that time. While the catastrophe could hardly have been foreseen, trustees at California schools since then have been aware that candidates' memories are long about earthquakes. Los Angeles has a smog identity that discourages applicants. In short, trustees need to recognize that everyone may not love the school or the area in which it is located as they love it, that everyone might not overlook

"warts" as readily as they do, that candidates are contemplating a major career investment that inevitably will involve some trauma, and, not least, that the opinions and reactions of a candidate's spouse can play a principal part in the acceptance or rejection of an offer.

In addition to establishing a timetable and setting a budget at the organization of the search committee, members should concur on the range of the compensation package the school can reasonably accommodate. Once the proposed cash salary and benefits range is agreed upon, the committee chair should solicit the endorsement of the full board. This approval at the beginning of the process can obviate problems at the end when the critical closing details are being consummated.

### Search Participants

**T**he composition of search committees is as diverse as the schools they serve. Some number as many as 15 or more persons representing all school constituencies including non-trustee neighbors. Others are made up only of trustees with membership as small as three to five.

Many schools have found that an effective system includes a trustee search committee of five to seven members (all clearly enjoying the respect and confidence of their fellow trustees and other school component groups), with the board chair as an additional *ex officio* member, and a separate advisory committee representing all other school constituencies. Depending upon the age, size, and grade levels of the school involved, representatives on the advisory committee usually include two to four faculty members (elected, typically

one from each school division); one or two staff members (elected); one or two parents (appointed and often the immediate past parents association president or the person most likely to be the next president, assuming that the current president is an *ex officio* member of the board of trustees and therefore will meet candidates in that capacity); and, if the school includes high school grades, two students (elected preferably from grade 11). The advisory committee thus will range in membership from six or eight to a dozen. Members often elect their own chair and develop generic questions to ask of candidates.

The function of the advisory committee is to provide input about the candidates and, for the faculty, staff, and student representatives, to reflect their colleagues' opinions of the candidates. The advisory committee meets with the search committee after the semifinalist candidates have visited the school to express consensus views and meets again after the finalists' visits to register further appraisals. The search committee chair should stress to the advisory committee members the importance of their work and the necessity of maintaining complete confidentiality and discretion about their deliberations. Combining representatives of all constituencies on a single committee tends to reduce competition (turf protection) between individual groups, and frequently serves to establish cooperative cohesion as well.

### Clarifying Expectations of Advisory Committees

Advisory committees play an important role in building consensus around a decision on future leadership. At the beginning of the search, the search committee should clarify the role of those who will be providing input. It is clear that a candidate to whom there was a strong negative response would be a poor choice for head. With pre-screening of candidates and good reference checking, that is unlikely to happen.

References are extremely confidential. They are one of the most informative indicators of performance and must be available only to the search committee. An advisory committee and campus participants, therefore, have less information on which to judge candidates. Even so, their input, insights and thoughts are valuable additions to the total information the search committee must weigh during its deliberations, and can help the search committee as it evaluates final candidates. But the search committee has the ultimate responsibility—and the breadth of information—on which to base final evaluations and decisions. Therefore, timing the request for feedback, not a vote, from campus constituencies is critical. Chapters 9 and 10 also address the role of advisory committees. Ed

### Duties of the Search Committee

**T**he search procedure is perhaps the single most important responsibility in which trustees participate. It is time-consuming and far from inexpensive. The mission, therefore, is to make the best possible appointment to ensure the most extended and productive tenure of the person chosen to carry out board policies.

Search committee members should be willing to commit to attending all committee meetings and all gatherings with semifinalists and finalists unless ill or unavoidably out of town. The first meeting of the committee should be a planning session to clarify the respective areas of responsibility, to adopt a search timetable, consider an estimated budget, determine the role of the faculty and others in the process, and develop a school and position description for distribution to applicants.

### **The search procedure is perhaps the single most important responsibility in which trustees participate.**

The search committee will develop and/or approve all search documents and procedures, determine the role of the incumbent head in the search process, and assess the need for workshops or retreats involving the board and/or faculty and staff. Early in the process, trustees should affirm or reaffirm the school mission and philosophy statements and should approve committee recommendations concerning search details, including the proposed range of the compensation package. It is also important that all involved subscribe to and honor confidentiality. In addition, trustees should know when and to what extent they will be meeting with candidates so they can protect dates and times.

Among the details for which the search committee is responsible:

- Announcement of the opening
- Determining information to be sent
- Establishing a system for acknowledging applications and notifying candidates of decisions as they are made
- Deciding how many semifinalists and finalists will be invited to visit the school and preparing the visitors' schedules
- Arranging for periodic progress reports to the board and to constituencies
- Developing generic questions for candidate interviews (as well as identifying questions candidates may ask the committee)
- Designating those responsible for checking candidates' references
- Organizing accommodations for visitors
- Selecting those school representatives who will visit finalists' home campuses (many such groups consist of two search committee members and an advisory committee member, usually one of the faculty representatives)
- Issuing the announcement of the appointment and any press releases and publicity pictures to be distributed.

Wrap-up responsibilities may include a purge of the files, analysis of search statistics, and an evaluation of the search process to be included in a summary report to the full board.

### Information for Candidates

**T**he importance of assembling accurate information about the school and determining what will be most useful to candidates cannot be underestimated. Some material will be readily available; some will surely need to be developed. Among the data that has proved helpful:

- The School: enrollment statistics, mission and philosophy, campus and facilities, finances, trustees, fundraising results, curriculum, and special activities
- The Students: three- to five-year data about attrition, admissions information about inquiries, applications, acceptances, new students enrolled, students of color, financial aid, college admissions (or secondary school admissions), geographic distribution, test results
- The Faculty: numbers, gender distribution, full-time/part-time, tenure, salaries and benefits, education, geographic distribution, administration, administrative organization, support staffing, faculty/administrator attrition, special individual faculty accomplishments
- The Position: reason for opening; search committee and advisory committee makeup, school strengths and challenges, characteristics and qualifications sought
- The Area: specifics about population, weather, transportation facilities, predominant businesses, health services, institutions of higher learning, communications systems, cultural activities, professional sports, and housing (if needed).

Many search committees have determined not to include the usual summary of remarkable qualities to be sought in candidates, relying instead on the belief that the strengths of outstanding candidates will be readily evident and that most traits listed will be present in varying degrees in all applicants. They have, however, found it useful to include a discrimination disclaimer on the statement sent to all candidates.

Individual confidential interviews by the committee with key school personnel at the beginning of the search can elicit valuable information about what these people perceive to be the principal strengths of the school, the primary challenges or problems facing the school that must be addressed in the ensuing three to five years, the personal characteristics and professional qualifications deemed most important to identify in the candidates, and general points of view about the board of trustees.

These interviews with the school "family" help those involved in the search to prepare themselves for the sessions with the candidates. Other points committee members should be prepared to discuss will center on local conditions and prospects, comparative national and local schools, and educational competition in the area. Candidates will also be particularly interested in the status of realistic short-and long-term school planning (especially campus planning and the established future goals) and will want to know whether or not the planning has been unilateral (head only), bilateral (head and board), or multi-lateral (all constituencies).

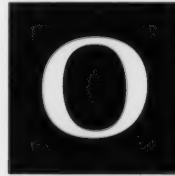
When the relevant information has been assembled and the proposed document has been drafted, the search committee should solicit editorial review and/or approval from the head, the advisory committee, and the board to assure both accuracy and concurrence in the presentation. Trust and a sense of participation from those involved are key ingredients to achieving a successful transition.

Trustees who wish to prepare for successful transition from the incumbent head to the head-elect need to understand:

- Why the results of some searches are successful and others are not
- Who will be the best trustees to serve on the search committee and who will be the best members of an advisory committee
- How best and most accurately to present information about the school to candidates
- What are the most important personal characteristics and professional qualifications to identify in the head-elect
- The role and responsibilities of the search committee and the advisory committee
- The importance of establishing a timetable and adhering to it reasonably but not slavishly
- That the most orderly change will be effected in an atmosphere of confidence and cooperation
- That how people act and respond during the process affects the future of the school. New people can assume leadership positions, but presence alone does not produce effective leadership in the eyes of the followers. Leadership is a reciprocal process in that it occurs between people. Mutual trust and support are essential.

# Getting Started

O R G A N I Z A T I O N



nce the search committee has been formed, there is a great temptation to start searching immediately. Resist it!

The first meetings and work of the committee should focus on understanding the committee's assignment, providing structure for organizational details, outlining methods for involving the school's constituencies and gaining their support for the search process, and developing a position description.

## Understanding the Committee's Charge

**T**he charge to the committee from the board of trustees should define:

- The role of the committee in developing the position description for the new head.

Generally, the committee develops the position description and presents it for board approval. (If the board has participated in a retreat, or a session devoted to reflecting on future goals, the trustees will be more attuned to the position description.)

- The role of the committee in the final selection and appointment.

It must be clear to all that the board will appoint the new head of school, and it must also be clear what the process for presenting candidates to the board will be. Generally, the board indicates that it will have confidence in the recommendations of the committee but will expect opportunities for all trustees to meet the finalists during their campus visits and to report to the committee their impressions of the candidates. The board should indicate how many finalists they expect and whether they want to know the first choice only or to receive a ranked list of the finalists. The committee should be prepared to present their second choice (and even third), because there is no guarantee that the board and first choice(s) will reach agreement.

- The scope of the search, the budget, and an expected completion date.

It is important to consider what limitations the budget may set on the scope of the search. (Some parameters to help you define the scope are outlined in Chapter 7.) Setting a completion date will aid you in working backwards in time to define the proposed schedule.

- Expectations regarding legal questions, affirmative action, candidates' files/confidentiality, the role of the incumbent head, and internal candidates.

## Organizational Details

**T**he first meetings should also review the organizational details that will guide the committee's work.

### **The discipline of setting a calendar will keep the search on schedule and avoid conflicts with the ongoing operations of the school.**

- Clerical support

Should you hire an executive secretary or divide this work among committee members? The work includes: recording the minutes of meetings; the actual drafting/writing of the position description; preparing and placing ads; maintaining candidates' files; planning candidates' visits; correspondence with sources for candidates, candidates themselves, and constituencies; preparing information packets on the school and the community for the semi-finalists; public relations; overseeing the budget; preparing and distributing agendas, calendars, and reports for the committee.

- Calendar

The discipline of setting a calendar will keep the search on schedule and avoid conflicts with the ongoing operations of the school. Also, candidates and the school's constituencies will want to know the search's time frame. Do not start to plan the calendar without referring to the school's calendar. (Nothing will lose the committee its credibility with the faculty and school staff faster, for example, than developing a calendar for the search that has candidates visiting during exam week.)

Working back from the targeted completion date, plan benchmarks for: completing consideration of finalists; completing consideration of semifinalists; starting the preliminary review of candidates; completion of the position description. (Subsequent chapters will help you determine the time to allow for each of these stages of the search.)

Once these benchmarks are set, plan your schedule of committee meetings. Then, review the calendar with the school head and decide which search dates should be placed on the school calendar. Your constituencies will be anxious to know how and when they will have an opportunity to participate in the search and when candidates will be visiting the school. It should be stressed that the dates are tentative.

#### ■ Budget

Searches are expensive and you should consider the best use of the money the board has authorized. Consider the costs of: outside help/counsel; advertising; candidates' visits, committee travel; head-elect expenses (moving, receptions, workshops); phone; correspondence.

These costs vary greatly and are particularly influenced by the scope of the search. If you are committed to a national search, you must be prepared for the expense of travel for candidates who are at a great distance from the school and the costs of hotels and meals.

#### ■ Meeting place

A regular meeting place will greatly facilitate the committee's work. Consider convenience and accessibility; confidentiality; private storage space for candidates' files; comfort (for lengthy meetings); an office address for the search.

### Constituency Involvement

**F**or many members of your school's constituencies the search will cause some anxiety. Thoughtful and timely communication with them will be a great help.

Up through the time that the committee is formed and holds its first meetings, it is likely that the school's constituencies have only received a formal announcement that the current head is departing and that there will be a search for a new head. Now that the committee understands its assignment and the search's organizational details have been resolved, a letter should be sent to the school's constituencies. It should include information about: search committee members and the roles of the search committee and the board in the search/appointment process; the time frame for the search; and the way they will be involved.

Finally, the letter should be upbeat and positive – and set the stage for change. (See Appendix B.) The importance of good communication in gaining support for the search process cannot be stressed too much.

The school's constituencies should have opportunities to participate in the search proactively as well as reactively. The search will benefit from having as much input as possible, and the committee should plan carefully a variety of ways in which people can get their ideas before the committee. This is hard work and appears to slow down the search, but with broad constituency input you will develop the best position description and you will strengthen the support of the school's constituencies for the search process.

### **What are some of the realistic and practical ways in which people can reach the committee?**

Your constituencies would love to have the search committee chair speak to each and every one of them personally. But what are some of the realistic and practical ways in which people can reach the committee?

- **Open meetings with the search committee**

Open meetings allow people the direct contact with the committee that many want. There should be several open meetings at the start of the search. One of the first scheduled should be with the faculty and staff.

- **An advisory committee**

One eclectic committee is much the best. You do not want, for instance, to have the possibility of a faculty advisory committee feeling at odds with a parent advisory committee. Representatives of different constituencies working together on one committee will promote a shared understanding of the difficulties and complexities of reaching consensus on the search process and, as it develops, the position description. The advisory committee will greatly increase the opportunities for people to be contacted personally about the search. The advisory committee will also be an excellent sounding board for the search committee.

- **Write, call, drop by!**

Search committee members should make themselves available. That first letter to the constituencies from the committee should encourage people to call or write committee members (list members' phone numbers and addresses). Members who are able should be encouraged to schedule times when they will be available at the school to meet with individuals who cannot come to the open meetings or who are reluctant to speak up at those meetings.

- **Targeted interviews**

Do not wait for key members of your constituencies to approach the committee. Identify the people who have been significant in the school's history or who are generous supporters of the school, and be sure to see them. You might also consider seeing members of your community who do not have direct ties to the school but who have valuable insights on the position of the school in the community.

### Developing the Position Description

**T**he position description includes a school profile, identifies key issues the new head will be expected to address, and lists the qualifications sought in the successful candidate. The position description should represent a consensus of the school's constituencies, and that is why you have worked so hard to have constituency involvement in gathering the background information for the position description.

This document will be sent to potential candidates and sources for candidates. The care and thoughtfulness with which it is prepared will reflect favorably on the school and the search process, and will help to attract the best candidates.

Do not underestimate the importance of a good position description. It will guide the searching, the reviewing of résumés and preliminary screening of candidates, and interviews with the stronger candidates. It will also be an important resource for the board in its charge to, and future evaluations of, the new head.

### Gathering Information

**T**o accurately describe the school, the key issues, and the qualifications sought, you need to start with the school history; recent evaluation/accreditation reports; the school's mission statement/philosophy; and strategic plans. Be well prepared through a thorough review of these documents before you get too far along in gathering information from your constituencies.

When you begin to receive input from your constituencies, you do not want to develop your priorities in reaction to the departing head. Try to get people to focus on the school's history and traditions, the school's current strengths which should be built on, and the future goals/objectives of the school. A standard set of questions – phrased in a non-judgmental way – and a method for recording responses will facilitate the process.

The goal of all your information is to reach some consensus on specific priorities for the school's future. The desired qualifications of the successful head will follow from these priorities.

### The Value of Several Drafts

**I**n preparing the first draft of the position description, try to include specific institutional priorities, and a specific list of qualifications for the next head. After the committee has wrestled with the first drafts, you may want to share the almost final version with any advisory groups and make it available to others. You want to ensure that the final version represents as strong a consensus as possible (see Appendix C).

## Legal and Ethical Concerns in the Search Process

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hile there is no specific body of law that applies only to the hiring of a head of school, those regulations

that cover general hiring in business must be followed. One may not, for example, discriminate on the basis of race, gender, religion, or disability. The one exception might be the case of an institution with a particular religious mission that seeks a head committed to the same principles.

Of greatest importance in the head search, however, is the fact that all boards of trustees mirror the most fundamental values of our schools. The public and private conduct of the board in the head search must reflect the behavior we expect of our students and faculty. A school that espouses such principles as fairness, openness, thoroughness, sensitivity to individuals, or the recognition of merit must take great care to see that its search process exemplifies its teaching. The hiring of a head is a public example of how the school believes important decisions should be made. It is particularly important that it be made clear to the school community how, when, and by whom, the hiring decision will be made.

### The Job Description

**T**o assure both that the largest pool of talented candidates is available to the school and that all requirements of fairness are met, it is critical that the search start with an accurate definition of the particular position to be filled and that the actual hiring be done based on the position that has been advertised. The ability to discriminate among the qualifications of candidates and to justify the ultimate choice must be related to this role definition.

The specifics of the job description must arise not only from the functions of the headship, but from those particular tasks that the head will actually perform. If the school's mission requires candidates of one religion, for example, this needs to be specified in the job description. Otherwise the search must give full consideration to candidates without regard to religion. Or, in another example, if the school has a strong business administrator and the head will not focus on this area, the job description should not require extensive training and expertise in this field. To do so will only exclude talented candidates and raise serious questions about the fairness of the process.

In any search there is no perfect candidate who possesses all qualifications that may ever be needed in the job. It is important then to take seriously the task of defining the job. The search committee must prioritize those qualifications most important for success in a particular school and hire based on demonstration of those stated requirements.

### Expectations of the Head's Family

**O**ne subject that should be considered in the position description, to avoid later complications, is the matter of expectations for the head's family. There are many very successful single heads serving our schools. There are also many cases where the spouse and/or families of heads either play integral roles in schools or lead lives essentially outside the school community. It is extremely important that search committees be sensitive to the many issues involved. Perhaps no single matter has as much potential for ensuring or undermining the success of a new school head.

**In any search there is no perfect candidate who possesses all qualifications that may ever be needed in the job.**

If there are particular job functions expected of the spouse of a head, define these in the job description or establish a separate job description for the spouse. Be clear about how the school will recognize and support this service, whether by making the spouse a school employee or by inclusion in the head's agreement. (Do not expect "two for the price of one.") If, on the other hand, such functions are not critical to the role of head of your school, do not then use family status as a criterion for hiring. It is most important to clarify these expectations at the start of the search process and to use the same expectations for all candidates.

### Advertising

**O**nce the position description is complete, two matters of advertising must be decided. Fairness and an honest desire to seek the best candidate require a broad awareness of the position. While you may choose a local, regional, or national search, it is important that the advertising within that area reaches a large number of potential candidates. Purposely limiting the types of audience contacted will necessarily remove talented candidates from the pool. At the same time, the search committee needs to clarify the issue of in-house applicants. If, for example, a decision is made to seek only an outside candidate or if it is determined that no current employee meets the specific stated qualifications for the position, it is important to say so immediately. Misleading the community on this matter will only call into question the honesty of the search process and harm the successful candidate.

### Candidate Interviews

**W**hen conducting interviews of candidates, several guidelines assure that the process is fair and useful to the search committee as it evaluates applicants. Keep a log of all inquiries received and retain notes from all interviews conducted. This will provide an objective record of the nature of the search and a demonstration of reasons for the final selection. Whenever possible, conduct interviews with the same group of interviewers so that comparisons of candidates are valid.

Prepare a standard protocol of core questions for use in all interviews. The questions should be related directly to the stated job description and requirements. It is important that any questions asked be applicable to all candidates. For example, unless the position description specifies a role for a spouse and unless you ask the same question of all candidates, male and female, avoid questions about marital status or family planning.

### Checking References

**O**bviously it is essential that references be checked before the new head is named. During the search process it is desirable to respect the confidentiality of a candidate, particularly concerning his or her current school, if that is requested. At the point at which finalists are to be named, however, references must be contacted. Because of the effect of the public nature of this process on the current position of candidates, it is important not to create unnecessary public embarrassment of applicants. Therefore the number of finalists should be limited.

It is vital to gather a number of written references on each candidate in addition to phone checks. Receiving written documentation first will often suggest key follow-up questions for phone conversations. Keep notes on phone references. Questions should concern specific qualifications for the position that grow out of the job description, and comparable questions should be asked in the reference checks for each candidate to allow a fair comparison. Take care to ask only questions that would be asked of every candidate, regardless of gender or ethnic background.

### The Head's Contract

**T**he success of the chosen candidate in leading the school depends on a good working relationship between the board and the head. At no time is the clear communication of expectations on both sides as important as the beginning of a new headship. While the written documents of employment for heads of NAIS schools take many forms, from elaborate legal contracts to simple letters of understanding, they are all essentially communications designed to clarify the matters of greatest concern to both parties. (A recent study suggests that 89 percent of NAIS heads surveyed had formal written contracts.) While the needs of individual schools vary and there is no single correct contract for a school head, it is very important that a document be drafted to protect the school and the head from later misunderstanding on a number of essential matters.

In thinking about the form this contract should take in a particular situation, two assumptions are important. It is a given in today's independent school that the key board members, issues of concern to constituents, and institutional needs will all change over time. A formal contract does two things. First, it provides institutional memory of important details of the hiring agreement at a later date when the key trustees have changed. Second, a contract carefully constructed at the time of hiring protects all parties in the unfortunate circumstance that a transition in leadership becomes necessary later. At the same time, it is important to recognize that all aspects of the headship cannot be reduced to writing. While it is important to clarify key aspects of the hiring agreement, nothing can replace the good faith and trust that are essential for an effective working relationship between the board and the head.

A contract is a legal agreement between both parties and not a record of school policy. Board policies should not be incorporated into the contract because they change over time. The contract must meet the needs of both parties in stating the aspects of the employment agreement that are of greatest concern to each.

### There is no single correct contract for a school head.

What then should a written contract cover? Most NAIS contracts cover some or all of the following issues: length of contract, procedures for termination, duties of the head, and compensation and benefits. Sample contracts are available from the NAIS Department of Administrative Services.

### Length of Contract

**T**he contract should set forth the term of employment and the procedure by which extension of the term will be determined. There are many models in use in NAIS schools where contract length varies from one to five or more years, and where notice of non-renewal must be given anywhere from three to 18 months or more before the end of the contract. Many schools also use a rolling contract of fixed duration that is automatically renewed unless notice is given by the board to terminate the agreement by a certain date. Recent research suggests that the most common approach in NAIS schools is to use multi-year contracts of three or more years with a notice of non-renewal due 12 or 18 months before the end of the contract, with the longer terms most common for highly experienced educators. While not legally enforceable, many schools are also asking heads to make a commitment to notify the board six to 12 months before leaving the school.

### Termination

**I**t is an unfortunate fact that in some cases "disruptive separations" between the head and the board occur. The best time to assure that such a situation will be handled with dignity and minimum damage to the institution is at the point of hiring. The head's contract is an appropriate place to spell out procedures to be used should termination occur. Such an agreement provides the new head with the sense of security needed

### **A contract is a legal agreement between both parties and not a record of school policy.**

to make a major move and to take on difficult issues, and provides the institution with the hope of an orderly transition should a "divorce" become necessary.

### Duties of the Head

**B**oards have taken many approaches to specifying the duties of the head in the contract. All recognize that there is no way to reduce all aspects of the job to writing. Some simply specify the process by which the board will communicate its annual expectations and priorities to the head and the means by which it will evaluate his or her performance. Others choose to include specific goals in the contract. One must remember that institutional needs change often. More important than including the aspects of a job description that will become outdated, is a formal agreement that a process of clear communication of mutual expectations between the head and board will exist.

### Compensation

**T**here is enormous variety in the compensation packages of school heads that reflects the independent nature of our schools and the varying needs of heads at different stages of their careers. However, it is important that there be a clear and comprehensive written understanding of all agreements made on these matters. This will provide an institutional record to avoid future misunderstanding and establish the tax basis of benefits, if any, that are not available to all employees. Most NAIS contracts cover such matters as the following if they are applicable: salary, insurance and pension payments, housing assistance, vacation and sick leave, automobile use, professional development, moving expenses, assistance with school expenses for children of the head, and school-related expenses. Whatever the particular arrangement between board and head, the contract should serve to preserve the details of the agreement.

# Identifying, Recruiting and Evaluating Candidates

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thoughtful planning process that integrates the search for a new head with the long-term goals of your

school prepares you to be effective and efficient during this phase of the search — whether you're undertaking the process on your own, or with the help of a consultant.

Several issues should be evaluated at this point. Carefully defining your criteria at this stage is useful for honing the thoughts of the search committee. If you are precise about requirements for the position, you will be more focused in your outreach, and will find it easier to review the materials. Candidates will better understand their appropriateness for the role. If you have decided, for instance, that fundraising experience is critical for your candidate, saying that makes it clear to everyone concerned.

A key issue is the definition of acceptable candidates in terms of experience. Large complex schools might limit their search to candidates who are already heads, although many do not. Smaller schools have the opportunity to look at a wide range of people. Before defining those parameters it is wise to assess the capabilities of the senior staff and board to support a first-time head. It is useful to define the kinds of experience

you want as a bottom line. Will a department chair be considered, or only an assistant head, a division head, a director of development or admissions? How will you set priorities for the need for financial management experience and experience at managing multiple areas? (Appendix G describes a useful tool for setting such priorities.)

Understanding how to evaluate candidates who have been heads as well as candidates who would be new to the head's role is critical. (Chapter 8 offers guidelines for this process.)

### Advertising

**A**dvertising can be an important part of the process of identifying potential candidates, but should not be relied upon as the only means of finding candidates. An advertisement, like any substantial discussion you will have, should combine the challenge or opportunities of the role with the best features of the school. If yours is a school that is struggling, although it has lots of potential, saying so will deter those who do not want to take on that much of a challenge. Combining a statement about major challenges with a statement of pluses can attract candidates who are committed to independent school education and understand their own abilities and readiness to tackle a difficult situation. (See a sample advertisement in Appendix D.)

Where to advertise depends on a number of factors. Many schools choose *Education Week* and *The Chronicle of Higher Education*. Specific journals that focus on elementary schools, middle schools, high

schools, progressive education, developmental education or other special program aspects may be as, or more, useful. Schools with a religious affiliation have other specific journals to consider.

The classic method for filling a leadership position, especially in academia, has been to advertise. But it has flaws, including a lack of confidentiality. Sending a résumé to an unknown group can result in embarrassment for a candidate if he or she is making a very preliminary inquiry to see if there is mutual interest. Because the inquiry is preliminary, a candidate may not want to inform the appropriate people at his or her own campus. Such exploration is much different than a serious involvement in a search, when responsible candidates will inform the head of school or board chair at their current campus.

### **An advertisement should combine the challenge or opportunities of the role with the best features of the school.**

It is more informative to have a preliminary discussion about whether or not a position is potentially a good match than it is to respond to an ad. For that reason, many excellent candidates who would never respond to an ad would respond to a telephone call.

Often, when a school is looking for a new head, rumors abound – some true, some not. Candidates may be deterred from responding to an ad because there are too many unanswered questions. But in a conversation those issues can be discussed and evaluated.

## Networking

**O**ne of the best sources of "advertising" or more appropriately, "networking" can be within your own community, broadly defined to include the current (and former) school staff, alumni or friends. Carefully defining the qualifications for the headship increases the appropriateness of these referrals.

"Networking" has become a much overused term. However, in the world of independent schools it is a useful mechanism because independent schools are a definable universe within which you can set paths for identifying candidates and for checking references with people who know their professional work.

There are candidates for your headship "out there" who are simply not looking for a new position. They are content where they are, but they also might be the right person for your school at this time. Describing your school and your requirements well to potential sources could yield interesting candidates, some of whom might be interested if they were personally approached. Your headship might appeal to an individual whose current situation is fine, but not as challenging as it once was because the original priorities have been achieved.

A candidate may respond to an intriguing position that corresponds to his or her thinking about the future, although he or she may not have expressed this view in professional circles. The worst outcome of approaching such a "candidate" is that an outstanding person is flattered, but not interested for personal or professional reasons at this time. Outstanding individuals are excellent referrers and often will suggest others when they're not interested, or you can ask specifically for their recommendations.

## Seeking Diversity

**W**omen and people of color are often reluctant to respond to advertisements, not knowing whether their candidacy will be seriously considered. A simple statement in the advertisement can address this issue. If you want candidates who are women and/or people of color, this should be incorporated into your networking as well. Often, simply asking a source for women and/or people of color after receiving the initial recommendations is an effective method for identifying additional talent. Including senior women heads and people of color in your mentor/resource category is another useful approach.

Women or candidates of color might ask if their candidacy would be seriously considered. A more difficult case is a candidate who does not want to ask, but who has had an unfortunate prior experience and is very wary. Candor and directness on the part of the school are the best approach. A school that has diversity in its student body, faculty, staff and board will be more convincing.

In seeking candidates, there is the matter of equity. There is also the issue of talent. Search committees often are concerned about the number of qualified candidates available. It's important to remember that women and people of color are an underused resource at a time when schools need strong leadership to meet ever increasing challenges.

### **The Search as Learning Process**

**A**nyone involved in a search at any level is learning. Listening is important throughout the process. At the beginning it is important to listen to the school's constituents because they help you shape the role of the next head of school by articulating current strengths, areas which need improvement, and future goals.

You will also learn as you begin to talk to mentors, and to sources at associations and training grounds. The learning can encompass how others see you, which includes what is appealing (or not so appealing) about your school.

From these sources you can learn about more sources – and you can learn more about the candidates who have been referred to you.

Approaching each contact as an opportunity to learn and explore maximizes the usefulness of each conversation.

Good listening improves the search process.

It heightens your awareness of your institution's strengths and can bring you new professional allies, fresh insights into national trends, and a knowledge of successful practices and models elsewhere.

### **Identifying Sources**

**E**ffective searches require planning to be sure that you use your time wisely and effectively in seeking candidates. Think of territories where you might find suitable candidates. If you plan to use a search consultant, ask potential consultants about their strategies for identifying candidates.

### **If you define the parameters too narrowly you may miss some excellent people.**

If your school is a coeducational secondary boarding school, similar schools are an obvious territory. However, good candidates might also be found in K-12 schools, middle schools, or primary schools. Often candidates, consciously preparing for a headship, gain experience in different settings. If you define the parameters too narrowly you may miss some excellent people. Through good networking you will find these candidates.

Search committees vary in their readiness to look outside independent schools at either public schools or higher education. These alternatives should be discussed both as potential ideas and because candidates do move among these areas.

In addition to NAIS, there are regional organizations and a variety of organizations with special concerns such as boarding schools, country day schools, elementary or secondary schools, and the Council for Women in Independent Schools (CWIS). Within each organization is at least one individual who knows the members well. These referrers will vary in their critical judgment and their willingness to recommend, but they are a potential fruitful source of candidates. (The *NAIS Directory* lists member associations and other related associations.)

Among senior independent school heads are many mentors who pride themselves on developing future heads of schools. They are generous in their mentoring and generous in sharing their knowledge of people. Call them.

The organizations and individuals who work with developing leadership through formal degree programs or special workshops are also useful resources for your search. Again, being precise about your requirements enables them to be precise in their referrals.

**Among senior independent school heads are many mentors who pride themselves on developing future heads of schools.**

Within the various territories there are observers and recommenders. People who fund projects, grant awards or fellowships are key observers. Every situation has a unique set of observers and recommenders whom you should define and call.

### Effective Networking

**H**aving articulated your advantages and your challenges by drafting an advertisement and/or job description, you have the basis for an introductory statement to sources. For example, "Pine Tree School has a dedicated faculty, supportive parents and students who develop their fullest academic and social potential — but we need new facilities. We are looking for a head who will help the school grow at what it does best and lead a major fundraising effort."

Sources will often reel off names. Again, being precise about your needs and encouraging respondents to share more than a name with you can be extremely helpful. Asking a source or recommender to explain the referral will help each of you clarify its appropriateness.

You will learn most if you deepen the dialogue: "Tell me about Ann Smith and why you believe she is what Pine Tree School needs." The range of answers can be "Oh, she is looking for a job," or "She just completed a campaign for Sea Shore School with superb results." If your next question is "Why do you think she will be attracted to Pine Tree School?" you will be preparing for a call to a prime candidate.

### Initial Contact With Candidates

**U**nderstanding what might attract a candidate to you is the key to your initial conversation. It could be as simple as wanting a school nearer home and family. It might be the attraction of a school with a particular mission, or a bigger, more complex school. It might be a decision to move on after accomplishing a specific set of goals.

It is important to convey your belief in your cause, and to be prepared with your best description of the role, as much information about a proposed candidate as you can muster, and flexibility within your parameters. Assumptions about a candidate's unwillingness to move from one part of the country to another, or a married candidate's ability to move, or other potential deterrents may keep you from finding a superb candidate. Candidates' responses can range from an immediate interest to an immediate non-interest, and a variety of responses in between. How you proceed depends on the response.

If a candidate is interested you can continue the dialogue, adding more about your school and asking the candidate more about her or his experience. Or a candidate may ask you a series of questions before deciding whether he or she is interested. This dialogue can tell you a great deal about his or her interests and concerns.

Not all candidates write effective, easy-to-read, informative résumés. Therefore, in your advertising for candidates, or conversations with candidates identified by sources, ask for a letter describing their background in terms of your requirements, and a statement of educational philosophy. With these at hand you can more knowledgeably decide if a candidate has the experience and the vision you are seeking.

### **Not all candidates write effective, easy-to-read, informative résumés.**

Sometimes, a candidate will want time to think about your conversation or to see more information in writing. A well-prepared letter, such as the one described in Chapter 3, is a good marketing tool. (A sample appears in Appendix C.)

### Thinking Strategically

**A**t several points, as early as possible, it is wise to evaluate the strength of the applicant pool. You can decide how fruitful advertising or networking has been so far and if more intensive effort in identifying candidates is in order. What may look like a large pool of candidates always dwindles, either because of lack of qualifications, poor references, other job offers, or family priorities. It is best to assess this as soon as possible.

As you talk to a variety of people, issues will arise that you need to bring back to the search committee and perhaps to the board. Sometimes there are questions about the board, its leadership, and the continuity of that leadership for the new head. There may be questions of salary or the spouse's role. This is the time to explain the proposed salary range to potential candidates and to learn their salaries and significant benefits such as housing or a housing allowance.

### **It is a good idea to interview two or three viable candidates as soon as the search committee has a sense of the overall pool.**

If there is a problem stemming from salary, it is better to know it early. Other issues, which are manageable but may keep you from attracting good candidates, can be addressed early in the search process to correct the situation.

Giving yourself sufficient time to begin interviewing, while still identifying candidates, allows you to assess how well the search is going and to decide whether you need to devote more resources or time to it. It is difficult to gauge the quality of the pool of candidates until you begin meeting the individuals.

It is a good idea to interview two or three viable candidates as soon as the search committee has a sense of the overall pool and a belief that these first candidates appear to be a good match. This will be a test of the accuracy of your assessment. Keeping candidates informed of your time frame and touching base with them periodically permits the dialogue to deepen as you continue the evaluation process.

## Getting Serious About the Candidates

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nce the pool has been built and the candidates have submitted résumés and letters of reference, the process of sifting and evaluating all the information you have gathered about them – the “folder review” – begins. The committee’s role in the folder reading depends on a variety of factors. One is the degree of the committee’s confidence in the judgment of the consultant, if one has been used. Another is the school’s need to build a sense of community. The greater the need, the more the search committee should be involved in every phase of the process. Often, a third factor is whether any search committee members who enter the process with a favorite candidate need to be enlightened about how that person compares to the rest of the pool.

### A Word About Confidentiality

**A**s a search committee member, you are certain to be approached by members of the school community and others who are interested in the progress of the search. Some will have heard rumors about who is applying for the position and will be seeking confirmation.

Members of the search committee must understand that from the beginning of the process through the semifinalist stage, all applicants are entitled to the courtesy of confidentiality. It is vital that this implied promise of confidentiality not be breached – deliberately or accidentally – by anyone. The independent school world is a small one; a careless remark might well jeopardize a candidate's standing at his or her school. References should only be called if the candidate has granted the committee or consultant permission to do so. Those who reach the finalist stage, on the other hand, cannot expect their candidacies to remain confidential in the face of extensive reference checking and a possible on-site visit to their school.

At every stage of the process, applicants are entitled to be treated with consideration and courtesy. All applications should be acknowledged promptly, and candidates should be provided with a general idea of the timetable for the search. If that timetable changes significantly at any point in the process, all active candidates should be informed about the probable extent of the delay. As applicants are eliminated from the pool, they should be promptly notified of their status and thanked for their interest in the school.

### The "Folder Review"

**B**ecause search committee members bring a variety of perspectives to the folder review process, the chair of the committee should remind all reviewers of the accomplishments and types of expertise the school is seeking. In addition to considering the specific needs the school might have, it is always wise to seek a head who displays a capacity for leadership, an ability to adapt, a history of working with a wide variety of people, an association with institutions of quality, and an eagerness to grow.

Of critical importance is a candidate's ability to develop as a leader and as a person. Gleaning evidence of this from cover letters, résumés and supporting materials is far from easy. But search committees should seek information about a person's ability to assume increasingly responsible positions, to tolerate ambiguity, to make difficult decisions and live with the inevitable fallout, and to show tolerance in the face of criticism.

Above all, search committees must seek a good fit between the institution and the candidate.

Different types of individuals are appropriate for institutions at different stages of their development. A person with a successful history of starting schools may not be a wise choice for an institution that is seeking to refine an already solid program. Similarly, a person whose force of personality contributed to a successful turn-around may not be appropriate in an institution where much of the governance power resides with the faculty. In essence, the search committee must define what the institution needs and then focus on the varying strengths of the candidates.

### The Written Record

**M**ost search committees must evaluate a stack of folders whose contents vary widely. Candidates who have been involved in other searches may have files thick with references and other supporting materials. Applicants newer to the process may offer little more than a cover letter, a résumé and a reference letter or two. If there is a consultant, he or she will be well acquainted with some of the candidates, less familiar with others.

### **Above all, search committees must seek a good fit between the institution and the candidate.**

To overcome this obstacle, committees should search each folder, thick or thin, with an eye toward finding the following:

- A well-written, thoughtful cover letter that is interesting to read and that provides evidence that the candidate has a particular interest in your school. The letter should offer information about why the candidate feels qualified for the job and is excited about it. Ideally, the applicant should suggest how he or she might address some of the issues facing the school. In any event, there should be no doubt that the letter was prepared specifically for your school; it should not be a generic, fill-in-the-blank document.
- A brief résumé oriented toward accomplishments rather than titles, one that does not include a great deal of trivial information but that demonstrates a history of growth and achievement.

- Letters of reference that are specific, balanced and believable, and that come from people in a position to evaluate the candidate's current strengths and potential.
- Supporting materials providing evidence that the candidate can think broadly, write and speak well, or function successfully as a leader. School publications, speeches, policy statements or strategic plans authored by the applicant can provide excellent clues about the candidate's strengths and orientation. A yearbook dedication or other testimonial can offer insight into the candidate's standing in the school community.

If a consultant is being used, he or she should be familiar with most of the candidates and should provide preliminary ratings or rankings to assist the search committee in narrowing the field. During this initial reading of folders, the consultant can also be enormously helpful in providing perspectives on the candidates' credentials. The consultant should be able to contribute information, for example, about the quality of the independent schools at which candidates have gained their experience and whether the candidates have worked for or with outstanding educators known to be effective mentors. Search committee members who have never been responsible for hiring are often overly conservative during this phase of the process, gravitating to those candidates who have held or are holding headships. But overlooking non-heads who exhibit energy, enthusiasm, promise, intelligence and vision could prove a mistake. The consultant and the committee chair can play a valuable role in warning committee members against this predictable conservatism.

A heavy reliance on written materials may lead a search committee to overlook talented individuals, or conversely may lead a committee to believe it has a large pool of excellent candidates. Preliminary telephone interviews and telephone conversations with listed references—confidential and made with the candidate's consent—will add important information to your preliminary decisionmaking. This will also improve the quality of the in-person interview with the search committee. Ed

At the conclusion of the folder review process, the committee should be ready to identify eight to 12 semifinalists who will be invited for a preliminary interview. The committee should also identify another group of candidates to be put on hold, those who might be invited for interviews if the initial group does not prove satisfactory. A third group of candidates, those who do not appear compelling, should be notified that they are no longer under consideration. The consultant, if there is one, generally takes responsibility for the notifications.

### Interviewing the Semifinalists

To ensure that the semifinalists are well prepared to discuss the needs and challenges of the school they are seeking to lead, they should receive basic information about the institution. Well before their interview appointment, semifinalists should receive copies of:

- The philosophy or mission statement
- The viewbook and other admissions materials
- Information about the curriculum
- Biographies of the search committee and board members

Semifinalist interviews are often scheduled over one weekend and conducted off campus, although tours of the school might be arranged. Allow approximately two hours for each interview.

Before embarking on the semifinalist interviews, search committee members should remind themselves that there is no such thing as a perfect head of school or a perfect head of school candidate. Each prospective head you interview will have flaws. Your task will be to separate the fatal flaws from the merely disconcerting ones.

Unfortunately, many candidates invite criticism. Those who have not prepared for the interview by reading the materials about the school, those who cannot define their own philosophy of education, those who have not thought seriously about how to manage a curriculum, and those who are unable to explain why they want to lead a school all merit a committee's negative reactions.

Committee members, in turn, often rely too heavily on gut-level reactions to each candidate, which can be unduly influenced by trivial factors. Instead, the evaluation should be based on whether the candidate can offer evidence of the qualities and accomplishments necessary to lead this particular school. Remember, you are hiring an educational leader, not a companion.

**The tone of the interviews should be informational, not confrontational.**

At every stage of the search process, the committee must be oriented to attracting as well as evaluating candidates. The tone of the interviews should be informational, not confrontational. To ensure that all relevant areas are covered in the interview, some search committees ask each committee member to ask questions about specific areas of interest or expertise.

Because you want to focus on what a candidate can bring to the job, the questioning should be directed more toward learning what the person has achieved than toward hypothetical issues. The quick-witted, interview-savvy or experienced educator may do well with the hypothetical, but may not be appropriate for the job if he or she cannot provide evidence of an ability to deal with the specific challenges facing the new head. Search committees, for example, should inquire of candidates how they would use the mission to make decisions about academic and extracurricular programs. Questions designed to link the candidate's general philosophy and specific

In most instances, a search committee will interview its top candidates at least twice—once as semifinalists and again as finalists. Between those interviews a search committee should have completed references on candidates. Understanding the responsibilities, experiences, challenges, and accomplishments of candidates provides a context for those references. Therefore, using the first interviews to hear about actual experience enables you, or your consultant, to learn more from conversations with references. In a second interview setting, questions exploring vision and philosophy enlighten a search committee about candidates' thinking. Ed.

achievements can often elicit particularly enlightening information. (Examples: "Describe your management style and philosophy, and give us some examples of effective management on your part." "Characterize the ideal faculty-head relationship in a school you would head. What would the faculty mix be like? What type of experience and styles would you seek?")

If a consultant is present at the interviews, he or she can help to fill in gaps or raise important issues that have not been explored. At the conclusion of the interview, the candidate should be given an opportunity to ask questions. The candidate's choice of questions, in fact, can provide important information about his or her priorities and interests.

### Evaluating What You Have Learned

**A**t the conclusion of the semifinalist interviews, the committee should be prepared to select three to five finalists who will be invited to the school (usually with spouses, when there is a spouse) for an extensive round of interviews and meetings with representatives of all important constituencies. Again, committees approach the task of winnowing the candidate group in a variety of ways. Some use forms to rate the candidates numerically on important aspects of headship; most, however, rely on conversation and debate to reach consensus.

As this process unfolds, the chair of the search committee should not be surprised if disagreements develop about the relative strengths of the candidates. The role of the chair is to ensure that each committee member has an opportunity to voice his or her opinion and to remind those on the committee that interviews alone are not good predictors of future behavior. The criteria sought in a new head must take precedence over personal biases. While interviews can certainly be telling, it is also true that sitting heads generally interview better than non-heads, although they are not necessarily stronger candidates. The ability to relate socially to trustees during the interview process can also be given undue weight. The most likable candidate is not necessarily the best one.

Certain important characteristics of successful heads are especially difficult to gauge in an interview, including:

- A high energy level
- Interpersonal traits (optimism, emotional stability, patience)
- Interest in and effectiveness with children
- A willingness to work hard
- The ability to lead: persuasiveness, willingness to accept responsibility, ability to make decisions and openness to criticism.

While these traits can be either feigned or not readily apparent during an interview, thoughtful conversations with references and others who have worked with a candidate can help committees to gauge an applicant's strength in these areas. Thus, a candidate who appears well qualified

**The most likable candidate is not necessarily the best one.**

on paper but who does not interview particularly well should not be summarily dismissed.

Extensive reference checking and perhaps even a visit to the candidate's current school will provide far more reliable evidence of strengths and abilities than the artificial and highly charged interview setting. As the finalists are selected, the committee chair or consultant should make note of any unanswered questions or concerns about individual candidates so that those areas can be specifically addressed during the reference-checking process.

As always, those who do not survive the semifinalist round should receive that news promptly and graciously from the committee chair or consultant.

# References, Campus Visits, and Narrowing to Final Candidates

Finalists



## Checking References

he process of narrowing or “shortlisting” to finalists begins with references.

Reference checking is a matter of due diligence for any search committee of any board of trustees. Hiring the head of school is an important prerogative of the board – and that process must include checking references. Often a search committee can think that the search consultant, for example, is responsible for that task. Not so. The board must be satisfied that no stone has been left unturned. To that end, first-hand reference checking by search committee members, regardless of what other background sourcing is done by a search consultant, is a must.

Minimally, the search committee chair must be assured that at least every major written reference submitted for a finalist candidate has been followed-up with a personal phone call. The process of handling those calls will be discussed later in this chapter; for the moment, the point is that the calls must be made, in some systematic order and to the principal referees. If a search consultant is working with the search committee then that person will cover additional calls to complement the work of the committee. But it is the committee that must be satisfied that every opportunity has been given for referees to amend, edit, or embellish the written comments.

Before you begin the reference checking it is important that the candidate knows it is underway, and consents to it. Usually the checking of references has begun by the semifinalist stage; certainly no candidate can be considered a finalist until the reference checking is done.

If checking places the candidate in an untenable position, so be it. It is even more untenable for the school to arrive at the finalist stage of interviewing and visiting with the most basic level of background checking not completed. If the candidate is a finalist, then the candidate's references must be verified by the search committee; if the candidate cannot agree to this, then the candidate cannot be a finalist.

Referees must include the most recent and current "boss" of the candidate. It may be that checking the current boss is deferred until the end, but in no instance can the process be complete until that conversation is held. It is recommended that the chair of the search committee make that call, or the chair of the board in that person's stead. In addition to the telephone conversation with the current boss, it may be good idea for the chair of the board and/or of the search committee to meet face-to-face with that person once the finalist(s) has been identified.

"Bosses" would include the chair of the board if the candidate is currently or previously a head of school, or the head of school if the candidate is currently or recently in an administrative or teaching position. Additionally, the search committee may wish to talk with faculty, deans, or department heads. Less direct but still qualifying as "bosses" would be other trustees, present and past, for candidates who have been or are school heads.

**It is a good idea to talk with one or two people whose job description includes reporting to the candidate; that conversation can be particularly insightful.**

Other referees should include people with whom the candidate has worked professionally in a line position. It is a good idea to talk with one or two people whose job description includes reporting to the candidate; that conversation can be particularly insightful. In any event, the emphasis should initially be on the professional life of the candidate and as the interest in the candidate develops, can expand to a broader range of friends and associates who can discuss the personality and style of the individual.

It is also a good idea to ask each top referee for the name of another appropriate person for you to call; this broadens the scope of the shortlisting process, particularly broadening the universe of referees beyond those who have written letters at the candidate's request.

Being systematic and thorough is both time consuming and taxing. But it is another one of those responsibilities that must, as opposed to should, be completed. Keep in mind that it is a matter of due diligence on the part of the board to ensure that the background checking of the candidate has been comprehensive.

An imperative in this whole process is knowing how to conduct an in-depth reference check. Not only must the search committee give careful consideration to whom it will contact, but also it must be systematic and thorough in how it conducts the referencing. (See Chapter 6 for the legal and ethical issues in checking references.)

#### **The Content of the Reference Calls**

**B**egin by deciding what you want to accomplish as a standard for all reference checks. What are you after? What is important to know? Look to the criteria you have established in your candidate profile. Think about what you would need

**It is a matter of due diligence on the part of the board to ensure that the background checking of the candidate has been comprehensive.**

to know about someone in order to assure yourself that the individual being considered can deliver. In other words, set the criteria for making a successful reference call before you call. Have it uniform; what applies to one applies to all. In this way you will build uniformity within the process that will help guide the discussions within the search committee later.

This "uniformity" issue is important since you must control your own process. Typically several committee members are involved in checking references. Even if there are only two, how do you ensure that you have constants which guide the conversations those people will have? Your objective is to tighten the worth of the results of the interview by eliminating as many variables as possible in the calling (i.e., personal style, agendas, expectations, aspirations, etc.).

So, with objectives set and the criteria understood for conducting the reference interview, you now create a script that everyone follows. Initially, it is helpful to explain systematically to each referee the goals, issues, needs, and style of the school. Decide what is important about the school, the job, and the pending issues and then be sure that each person calling explains these points. This will set a context that the search committee will then know is shared by each of the referees contacted.

Next, prepare a list of questions relevant to the position—both professional and personal. Remember that the standards for the list are the criteria for the position that you have already developed. The questions must relate directly to the profile. You want them to be tools by which you can get at the issues that are important to your search.

For example, you may wish to develop a list of situational or problematic issues and ask the referee how the candidate might have responded. In this way you permit the referee to draw from first-hand experience rather than to respond to direct and therefore possibly limiting questions.

Another approach is to ask questions that help you understand what a candidate has actually achieved, or not achieved. Asking what the circumstances were when the candidate was hired and what has changed as a result of the candidate's work enables you to understand and measure his or her achievement. For example, understanding the enrollment picture then and now, or the fundraising specifics then and now, may provide you with concrete information. Follow up questions can inform you about the methods the candidate used, the time and resources it took, and how others view the work. Ed.

If you want to know about the candidate's leadership style, then ask about it. But be aware that "leadership" means different things to different people. You will need to qualify your terms in order to clarify intent. In all of this, you are seeking to determine if there is a match with your expectations and the perceptions of the referees about the candidate's skills, style, interests, and general abilities. Asking for the candidate's "weaknesses" is not really very helpful any more than is asking for the "strengths." Those kinds of categories need context in order to have meaning.

A few remaining points about reference checking: Know who it is that you are calling, listen hard for the "escape clause," and invite the "qualifier." We often forget that a reference is only as good as the person giving it. You need to know about that person's context – for instance, how long the person has known the candidate, the extent of the professional relationship, and the degree of personal ties.

"Listening hard for the escape clause" is vital. Ours is a litigious society; people are reluctant to speak candidly. It is helpful to establish that you are speaking confidentially. Often only part of a question will be answered; sometimes a response is tailored to address the successes only; occasionally a cleverly disguised response can lead away from a sensitive area. Someone described as a "workaholic" may be nothing more than hard-working; that person can also be unreachable and intimidating, and devoid of perspective.

"Inviting the qualifier" means deliberately and directly asking for reservations. Each referee should be asked, usually at the end of the conversation, if he or she has any reservations about the

### **Be aware that "leadership" means different things to different people.**

candidate; all referees should be given the specific opportunity to qualify the recommendation.

This is often done by making a statement such as:

Do you have any reservations about endorsing (Name) for the position of head of our school?

Or: Is your recommendation of (Name)

unequivocal? Or: Are you prepared to recommend (Name) without reservation?

Or: Is there anything else we need to know in order to properly consider this candidate for this position of great responsibility?

However you decide to phrase it, the same question would be asked of each referee called. If you do not ask the question, you may very well not get the answer.

### Visiting the Candidate's School

**D**ue diligence often includes visiting the campus of the finalist(s) candidates. While it can be tricky business, when handled properly, it is enormously valuable. Most importantly, it is the final, discrete step available to the search committee to ensure that the right questions have been asked. It also permits other important insights, such as how the candidate relates to others, which can only be gained by seeing the candidate first-hand on his or her own turf.

But there are important ground rules. First, visits are for finalist candidates only. The process of visiting school campuses is expensive, potentially disruptive to the host school, and, in every instance, not confidential. Visits need to be carefully planned and sensitively carried out.

Never visit a school campus without an invitation from both the board chair and the school head. A visiting team should be limited to no more than three. The team should include the chair of the board or that person's immediate successor – whoever will be the immediate boss of the new head. It can be very helpful if the chair of the search committee also is involved.

Keep in mind that the most important thing to the host school is the education of the young people there. Visitors are always disruptive; those who are there to ask questions about one of their own can be particularly so. A low profile is essential for an effective visit.

It is important to note that it is not always appropriate to visit. Circumstances differ; common sense should dictate what is best. No hard and fast rules exist; it's a judgment call worth very careful consideration. Certainly no visit should be arranged without consultation with the candidate.

### Never visit a school campus without an invitation from both the board chair and the school head.

A visit should be carefully planned. It is entirely worthwhile to establish specific, written goals and objectives for the visit. In a sense, it is a matter of "setting the stage." Once you have committed to writing why you are going and what you hope to accomplish – a clear statement of purpose and objectives agreed to by the search committee – you will want to make a list of those people you wish to see who are best able to help you achieve your goals. Consider the decision makers on the board; the board chair of the school will most likely be your best guide in this. Others might include top administrators, division heads, and/or department heads.

Keep it simple. More is not necessarily better. Since the candidate whose school you are visiting is, by definition, a finalist, you will already know a great deal about that person before you arrive on campus. It really is not a "fact finding" mission; rather, you are verifying what you have already come to understand about the candidate. As such, it is important to see the "right" people as opposed to interviewing many people. Unless problems are uncovered in the process, you really do not need to see a great number.

Think through your questions. Once you have set your goals for the meeting, develop your questions accordingly. Clearly you will want to meet the candidate's immediate boss; this should be an opportunity for a candid conversation to satisfy the committee that every opportunity was given to hearing reservations or legitimate concerns.

Remember: The candidate whose school you are visiting may not get the appointment. That person could be returning to that school. Thus, common courtesy would dictate that the visiting and interviewing process be unobtrusive, quiet, and tactful. That same approach will also enable you to observe the subtleties of the school being visited such as tone, morale, style of teachers, student behavior, and condition of the campus.

### Choosing Final Candidates

**S**hortlisting to the finalist(s) must be disciplined. Numbers are important; it really is difficult to justify more than three finalists; at this stage in the process, less is more. The people who are finalists will require another visit to the school (see Chapter 10), with spouse if appropriate, for a round of intensive interviews with a broad representation of the constituency. If the person really is not a qualified finalist, it can be very disruptive as well as disconcerting to the school community at large.

This means that the process of choosing the final candidates is significant. It also assumes that the board, through its search committee, has done its homework from the beginning, as outlined in the previous chapters. Again, careful attention to detail in the beginning of the process and disciplined adherence to the process throughout the search will result in the best opportunity to make informed choices decisively at the end.

A search consultant should have very little to do with the selection of the final candidates. The search consultant does develop a pool of appropriate candidates for the job. The consultant also shortlists that pool to a previously agreed number of candidates to refer to the search committee. It is assumed that any one of the candidates referred by the consultant would be professionally qualified to do the job. Once referred, the search committee should then be left free to narrow the field.

**It really is difficult to justify more than three finalists; at this stage in the process, less is more.**

It is important to remember that the board remains when the finalist is appointed, to govern with the newly appointed head. The search consultant, however, leaves. Therefore, the search committee must hold fast unto itself in making semifinalist and finalist candidate selection decisions to ensure the integrity of its final recommendation to the board for appointment of the new head.

In choosing finalist candidates, the shortlisting process means reviewing all the information available, including reports from faculty, student, parent, and alumni advisory groups. It means comparing the notes of search committee interviews and references – always using the profile agreed

**The objective is to select that candidate whose skills, interests and style best satisfy the goals and needs of the institution.**

upon at the beginning of the search as the standard. It means asking hard questions like: Do the candidate's foremost abilities and interests match the school's critical issues? Is his or her thinking about education compatible with the school's mission? Is there good chemistry between the candidate and the people of the school?

Two key points in all of this: Evaluate uniformly and focus on strengths. The quantity of information available to the search committee in the final decision-making process can make that process confusing unless it is carefully managed. It can be very helpful to build a selection screen as a guide before undertaking the final "cut." For example, when the search committee is weighing the worth of two or three finalist candidates, it might consider setting up a "Must" and "Should" screen of the significant points. The search consultant can be very helpful in setting up this procedure.

Second, focus on the strengths. Clearly no candidate is perfect; each lacks something. It is also true that those candidates who surface as finalists are strong by definition; they have already gone through a process screen to be a finalist. At this juncture the most positive posture is to identify the strongest among the already strong candidates. The objective is to select that candidate whose skills, interests, and style best satisfy the goals and needs of the institution. Often a search committee can become bogged down with what the candidate "does not have" rather than focusing on that which the candidate "has."

On a concluding note, one thing the search committee should not do, ever, is to request that a support group to the search committee make a recommendation of a particular candidate. When gathering the final input from interviewing groups (parents, alumni, students, faculty), do not ask for a preferred candidate. Do ask for input on each candidate and set a prescribed format for doing it. The search committee wants to avoid having any special interest group in the school declaring its candidate; it wants to encourage, on the other hand, general input from each.

## Interviewing the Final Candidates

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he months of searching for candidates and researching their backgrounds, experience, and qualifications to meet the needs and achieve the goals of your school have led at last to the finalist interviews. These in-depth talks will form the foundation for your decision and the appointment of a new head of school.

After the selection of the final candidates, the committee must decide whether to have a one-day series of interviews with all finalists before selecting those to bring to campus. The use of this process may be dictated by the number of finalists chosen. If that list includes five or more viable candidates, a single day of intensive and comparative interviews can provide a productive basis for narrowing the list of those to be brought to campus for more extensive exposure and exploration.

### The One-Day Interview

**W**hen the number of candidates suggests the advisability of this intermediate step, careful planning is necessary to make the best use of time. Where should the interviews be held for most efficient results? What questions will produce the most revealing information for comparing and contrasting candidates? How much time should be allotted for candidates to ask their questions about the school and the position? How will the committee evaluate these interviews in refining its list of candidates?

#### ■ Interview Site

Interviews may be held on campus, at a conference room in the offices of a committee member, at the home of a committee member, or even in the conference room of an airport club. Determining considerations in your choice should be convenience and the site's adaptability to providing privacy for, and full attention to, the individual candidates. They should not be asked to wait together or to encounter each other on campus tours. Care must be taken to assure each candidate the full attention of the committee and consideration upon individual merits. Though the on-campus site has the advantage of giving the candidate a feel for the school, a neutral site may offer better logistics for keeping the focus on each individual and for avoiding school-wide curiosity about the candidates before the selection of finalists.

#### ■ Interview Format

The time reserved for each candidate will vary with the number of finalists scheduled for the one-day session. At the most the interview will continue for two hours, at the least, for one. Very careful preplanning will be vital to productivity. Establish the agenda to be used, develop questions to be answered by each candidate, assign specific ones to individual committee members, and allow a reasonable amount of time for the candidate to question the committee.

#### ■ Evaluation and Follow-Up

Though it would be unwise to attempt a complete evaluation of candidates at the end of a marathon day of interviews, a sampling of spontaneous reaction may be pertinent to later in-depth evaluation. For example, the committee could develop a checklist or quantitative evaluation sheet to use at this juncture and to distribute more widely during the campus visits of the finalists. The sample checklist would, of course, be adjusted to reflect those qualities that are most important to a given school. Before adjournment, committee members may elect to complete this for the chair to tabulate and report on at the beginning of the meeting to determine the finalists.

Within days after the interviews the search committee should meet for a full comparative evaluation of the candidates interviewed and reach a decision about those in whom their interest is strongest, narrowing the list to two to four to be invited back for on-campus interviews. Both those retained and those eliminated must be notified of their status immediately thereafter.

### Planning the Campus Visit

**C**ommittees who did not need to do one-day interviews will now follow the same process as those who have reduced their candidates to a smaller number. Finalists will be invited to the searching school for a two-day visit in which representatives from all constituencies of the school

### Take care to assure each candidate the full attention of the committee and consideration upon individual merits.

will be given an opportunity to meet and react to the candidates. To make these visits meaningful to the candidate and to the school, extensive planning and preparation is necessary. The committee also must decide whether this will be the final interview opportunity. If so, the candidate's spouse, if he or she has one, should be included in the visit. If, however, the committee plans to bring the preferred candidates back for a final interview, inclusion of the spouse may be delayed until the next round.

### Before the Visit

**I**f a candidate has received an earlier mailing containing basic information about the school, such as catalog, faculty and student handbooks, and school publications, another packet should now be sent to the finalists containing more in-depth, in-house materials. This would include financial information (budget reports for the current year and audit reports), the long-range plan, the most recent accreditation report, minutes of current meetings of trustees and faculty, and statistical reports for at least the last three years on enrollment, annual giving, and capital giving.

Publications descriptive of the community itself, often available from the Chamber of Commerce, are also useful if they were not included in the earlier mailing. All of these materials not only expand the candidate's prior understanding of the school but also serve as a valuable basis for discussion during the on-campus interviews.

Reservations for travel should be worked out with the candidate at the time the invitation to return is issued. Soon thereafter the committee will determine the arrangements for accommodations and make the necessary reservations. Some schools prefer to house candidates with committee members; boarding schools offer guest accommodations on campus; the majority of schools make reservations at a hotel near the campus. The third alternative is often more considerate of the candidate, who will welcome some time and space to relax from the intensity of the interview process and schedule. If using commercial accommodations, be sure to prearrange payment so the candidate will not be required to assume responsibility for the bill when checking out.

Scheduling for the two days of the visit must be thoroughly established and, if possible, sent to the candidate before arrival or at least presented immediately upon arrival (Appendix E). The candidate will appreciate the listing of all appointments on the schedule with both the name and the position of the person. Also attach to the schedule a list of all members of the search committee, including the connection of each to the school, i.e., parent of James '92, or Alumna '76. This information helps the candidate put his or her interviewer in perspective.

The schedule should place the candidate on campus throughout the school day and include a minimum of 30 to 40 minutes with the following administrators: current head, assistant head, division heads, admissions and development directors, and business manager. Also allocate time for interaction with representatives of the faculty, students, parents, and graduates. Lunch-times present an opportunity to join a faculty group such as department heads on one day and a student group, perhaps the student council, on the other day. In addition, consider making the candidate available informally to any faculty who wish to come to a central location at a time period reserved for them. If the school has a faculty advisory committee working with the search committee, that faculty committee should be scheduled for at least an hour of formal interviewing. Parents and graduates are usually represented by their association presidents, and each is scheduled for an individual interview.

If the search committee does not anticipate bringing its ultimate choice back for a final round of interviews, other inclusions need to be considered for this visit. For example, the candidates may need to be introduced to a meeting of the full faculty. Full board exposure might also be arranged either through a late afternoon meeting with the board or a social hour in which board members have an opportunity to talk individually and informally with the candidate. These larger group meetings can be saved for the final round if one is planned.

Throughout the scheduling, the search committee recognizes that it will serve as host and thus use its members to meet and to transport the candidates apart from the school day appointments. Breakfast and dinner hours provide

*excellent opportunities for three different committee members to host and talk with finalists.* In the afternoon or evening on one day the full committee may wish to meet for an hour or so with each finalist. This meeting becomes mandatory if the committee does not elect to bring the preferred finalist back, with spouse, if there is one, for a wrap-up interview of at least one day.

The searching school that has elected to omit this wrap-up will want to include the spouses, where appropriate, of the candidates in the two-day visit to the campus. Whenever the spouse comes, separate scheduling would be provided to include a tour of the campus and a meeting with at least the chair of the search committee, perhaps all of the committee, to discuss the role of the spouse in relation to the school and the duties of the head. As a background to this meeting, it is very important that the committee predetermine its idea of the appropriate role for a spouse in its particular school setting. If housing is provided by the school, the spouse should have a tour of the house. Otherwise the spouse's tour of the

**Consider making the candidate available informally to any faculty who wish to come to a central location at a time period reserved for them.**

community might include convenient residential areas and perhaps an appointment with a local realtor to gain information about housing and living costs. Dinner meetings or social hours with the candidate would also appropriately include the spouse. (See Chapter 6 for a discussion of expectations for a head's family.)

### Hints for the Visit

**T**hough the obvious purpose of the visit is judging the suitability of the candidate for the position, it is important to remember that each candidate is also judging the school and its constituents. Just as the school is evaluating

### Three C's will be as helpful to the searchers as to the candidates: consideration, courtesy, and candor.

the leadership style, philosophy, personality, and compatibility of the candidates, so are they evaluating those same qualities in the school and its representatives. The headship is a demanding, all-consuming, too often thankless position. Strong and perceptive candidates recognize the challenge of the position and may be even more precise than the school in identifying the interactive chemistry underlying the process.

Three C's will be as helpful to the searchers as to the candidates: consideration, courtesy, and candor. Consideration is shown by being on time for scheduled appointments and not extending beyond the allotted time. Otherwise, the entire tight schedule will be thrown off. This lack of thought is inconsiderate of both the candidate and other interviewers. A candidate cannot demonstrate consideration if the hosts are not attentive to schedule details. This quality can be demonstrated, too, by allowing brief breaks in the morning and afternoon schedules and being certain that the candidate is shown the location of such areas as lounges and available telephones.

Courtesy is integral to enhancing a candidate's reaction to the school and its family. Be sure, for example, to assign someone the role of picking the candidates up at the interview location, escorting them to the dining room, and introducing them to the other guests with whom they will be lunching. Also be alert to accompanying candidates when the schedule calls for a change in location within the school. An unfamiliar school plant can be a maze for candidates and the courteous school will not leave them on their own to find the auditorium for an assembly or the lower school to visit a classroom. Even the simple courtesy of students and faculty speaking warmly to the stranger in the halls can be very significant to the impression created by the school.

Of all the C's, candor is perhaps the most important, especially in response to candidate questions. Good candidates will have done their homework on the school and will have genuine and specific questions about such areas as curriculum, enrollment, discipline, finances, issues, and long-range plans. Responses should be open, honest, and as detailed as possible. Problems should not be covered up if they exist. If the candidate is chosen as head, any lack of candor at this stage will magnify later problems. There are too many examples of emerging difficulties between school and head that are directly traceable to lack of openness and honesty with the candidate during the search process.

Likewise, interviewers should be candid in asking candidates questions that will reveal their qualification to head that particular school effectively. A school needs to know a candidate's position, for example, on discipline and structure to be sure it is compatible with the school's philosophy and approach. Single-sex schools will need to know the extent of the candidate's knowledge of and commitment to the values in single-sex education for boys or for girls. If the school prefers a leader who delegates, it needs to know if the candidate is an avowed autocrat.

A few caveats are also in order regarding questions and responses to the candidate. Candidate interviews are not the proper venue for lobbying, criticizing, axe-grinding, or pinning the candidate to the wall. Such approaches violate all the C's and can quickly discolor a candidate's reaction to the school. If staff, parents, or board members have their individual concerns to air or drums to beat, those should be expressed, if at all, when the new head is appointed, not with each of the candidates.

## Assessing the Visit

**T**he evaluation and comparison of the finalists can be accomplished by the Search Committee itself through discussion and analysis in its meetings. But the committee also needs to obtain and consider the reactions and ratings of the other members of the school community who have been directly involved in the on-campus interviews. There are several ways of achieving this input, and the committee should decide upon and explain its follow-up methods even before the visits begin.

## Potential Visits to the Campuses of Final Candidates

Philosophy, scheduling, and timing determine whether and when to visit the schools of candidates. Some search committees, and some consultants, believe that those visits should only take place after the finalists have had two- or three-day visits to the searching school. Others would like to visit the schools of candidates to more fully evaluate those invited to the searching school. This method can result that candidates who meet the school community are finalists with whom a search committee is totally comfortable. In either instance, these visits should be limited to finalists already interviewed by the search committee, and candidates on whom telephone references have been completed (see Chapter 7). Time requirements and consideration of candidates and their schools would limit these visits to a small number of finalists. Chapter 9 provides a good discussion of reality and protocol. Ed.

Many schools find useful the quantitative checklist mentioned earlier in connection with the one-day screening process. This offers a convenient and inclusive means of getting an average of the reactions to each candidate. If used, the checklist should be adapted by the search committee to reflect the qualities it has identified as most important in the new head. Copies of the checklist might then be attached to the schedule given to each of the interviewers and extra copies made available in the school office for faculty and others who had less formal contact with the candidates. To supplement the quantitative ratings, space for comments can be left at the bottom of the sheet and on the back. The completed ratings will then be returned at a designated time and place for collation and interpretation by the search committee.

Other schools have simply asked that all who came in contact with a candidate turn in a narrative of their impressions and reactions. This method may produce a wider range of attitudes but lacks the objective analysis of the checklist and is not so easily interpreted by the committee. If the search structure includes a faculty advisory committee, the chair of this group should be included in the evaluation meeting of the search committee to summarize and represent the reactions and preferences of the faculty. Many schools include a faculty representative on the search committee. If so, that member would play the same role as the advisory chair. (See editorial note on page 28 for more information on clarifying the expectations of advisory committees.)

Whatever method is employed, it is imperative in a psychologically successful search to give all constituents an avenue for input. Though the search committee is prepared and empowered to select the candidate to be recommended to the board of trustees (and has the complete, confidential references), it must be sensitive to the importance of faculty response to the candidates. The faculty and students are, after all, those who will interact with the head on a daily basis and who know the school more intimately than any member of the board can. Thus the opinions of these groups must be carefully considered if a smooth transition to the new head is to be achieved. It is also important to acknowledge faculty response by having the chair of the search committee meet with the faculty, express appreciation for their assistance and their input, and acquaint them with the timetable and procedure for making an appointment.

# Making the Choice

T H E C H O I C E

A

s soon as possible after the end of the last finalist's visit, the search committee should convene to determine which

of the two or three candidates should be presented to the board for ratification as the next head of school. The time between the visit and the search committee's meeting should be sufficient to gather and assess feedback from all the members of the community who have been asked for it. (It is assumed that the search committee has been given the charge to present ONE candidate to the board for ratification, rather than to have the board vote among the finalists.)

## The Structure Needed for the Decision

**T**he meeting should include a wide-ranging and thorough discussion of the search process to make sure that all bases have been covered, before moving on to a discussion of the merits of each of the finalists. The factors that the search committee will weigh should include: their own impressions of the finalist candidates based on the series of interviews they have conducted over the course of the search; the information and impressions gleaned from groups and individuals in the community who have met the candidates; results of calls to references made by committee

members; and information and impressions gained from a visit to the candidates' present schools, if those have been made. All of these factors will be measured against the needs of the school and the criteria established for the next head, as defined in the original position statement and refined during the course of the search.

Often, a clear "favorite" will emerge early in the discussion, and the committee is spared the necessity of ranking and/or voting among the candidates. If at all possible, such a vote should be avoided; the goal of the committee should be to reach consensus, so that the final candidate will be seen to have the unqualified and unanimous support of the search committee when he or she is presented to the board. Such a view will also assure the board that the committee has done its homework thoroughly and will allow the board, in turn, to give unqualified support to the candidate recommended by the search committee. Any perception on the part of the community that there is ambivalence or disagreement about the final selection can serve to undermine the new head's position.

In some cases a clear cut favorite does not emerge from the discussion. The committee can then turn to a ranking system, evaluating each candidate on a scale against the established criteria. If the committee has used a ranking system for candidates earlier in the search, these forms can be used again. Such a system should produce a "Number One" candidate, and may also produce a more or less strong "Number Two." The committee will then have to determine whether the second choice is viable enough to be offered the position if, for any reason, the first choice candidate does not accept it. Even in the case where a search committee has had to use a ranking system to select a final candidate,

however, members should accept the group decision and thus present strong, united support for the candidate selected.

Usually the president or chair of the board is an *ex officio* member of the search committee, and is privy to its deliberations and decisions. In any case, the board president should be informed of the committee's decision immediately. Either the search committee chair or the board chair should call the candidate to inform him or her of its decision and to affirm that the candidate will accept the position contingent upon ratification by the board and agreement on a satisfactory compensation package.

### Compensation and the Offer

**T**he search committee now turns over the determination of the final package to a group previously selected, usually consisting of the board chair, the treasurer and perhaps the search committee chair. Inclusion of the latter may be especially important if he or she is slated to become the next leader of the board, as is often

### **Search committee members should accept the group decision and present strong support for the candidate selected.**

the case. Preliminary discussions between this group and each of the finalists at the time of their last visit to the school will have provided an indication of the candidates' needs in relation to the school's resources. Presumably these have been close enough for all the candidates to have continued to be interested in the position, so that negotiations with the school's final choice should not come apart on this particular issue.

Properly conceived, the compensation package can be a compelling tool for the school to attract the person it really wants. Since each person's needs will be somewhat different, it behooves those negotiating on the school's behalf not only to be knowledgeable about what other comparable schools are offering, but to be informed about the candidate's expectations and flexible within certain boundaries about how the school's resources can be allocated. Searches should not come unstuck over the issue of a few thousand dollars in salary, or the use of a school car!

### Salary

**T**he compensation package has two major components, salary and benefits. Salary amount can be determined by reviewing salaries paid by similar schools in the area: information is available from NAIS and from many state, regional, or local independent school associations, which regularly publish such statistics. If the board is working with a consultant, he or she can also provide useful information. Other variables to consider in determining the salary are: cost of living in the area where the school is located; the school's enrollment, annual operating budget, compensation paid to other high level staff members; and whether the candidate is an experienced or first time head.

### Benefits

**B**enefits that will need to be considered as part of the total package include: medical insurance, life, disability and personal liability insurance, housing, use of automobile for professional and /or personal use, reimbursement for professional entertainment and travel, paid memberships and dues for professional societies, luncheon clubs, country clubs, etc., relocation expenses (a one-time cost), vacation, sabbatical leave, leave of absence, and contributions to retirement programs.

If the head has a family, the board may need to consider assistance for the spouse for school-related duties and/or assistance in locating employment for the spouse; and school expenses for children. If your school is inappropriate for the head's children because of grade level, single sex or other reasons, or if the head feels it is better for the children not to be in his or her own school, will the board consider paying tuition at another school as part of the package? Some of these ingredients may be relatively non-negotiable because they are determined by school policy (medical insurance, contributions to retirement programs, etc.) while others will be determined by the board's expectations of the head's role in the community (club memberships, reimbursement for entertainment). Still others will be determined by the head's personal, professional and family needs, and it is in these areas especially that the package can be personalized for the head you wish to attract.

Boards and heads also find in some instances that cash compensation can be exchanged for tax exempt benefits, thereby making the total package more attractive to the prospective head and perhaps even more affordable for the school. If a consultant is involved in the search, he or she may be a useful intermediary in making sure that the expectations of the two parties remain close together throughout the negotiations. Finally, it is probably wise for both the school and the prospective head to ask a lawyer and/or accountant to review the package before it is made final to make sure it conforms to current tax law and reduces risk to either party.

### The Contract

**A**lthough not strictly a part of the compensation package, boards should include in the offer a plan for evaluation of the head, thus establishing evaluation as an ongoing and routine process. The evaluation should be two-way, so that the board and perhaps others can evaluate the performance of the head and the head can speak openly about how the board can be more effective and supportive. The agreement between the board and the head should also include provisions for terminating the relationship, if necessary, that protect both the school and the head (Chapter 6 provides additional information on contracts and suggestions for including goals, creating the basis for evaluation.)

### Timing the Offer

**B**ecause most search committees have been given the mandate to recommend a prospective head to the board, not to appoint a head, the question of whether to make an offer before or after approval of the search committee's recommendation is a ticklish one. The most comfortable approach is for the search committee chair to call the committee's choice, informing him or her that he or she is the person whom the committee will be recommending to the board and getting the candidate's agreement to accept the position. It should be made clear by both parties that appointment is subject to ratification by the board, and acceptance subject to satisfactory compensation negotiations. The chair of the board and the candidate can then complete contract negotiations, and an unsigned draft of the agreement can be sent to the candidate.

If the search committee has been given a clear mandate by the board to recommend a candidate, if members of the community have been included in and informed about the search process, and if the search committee is perceived to have done its work thoroughly and satisfactorily, ratification of its recommendation by the board should proceed smoothly. Similarly, if the president of the board has conducted the negotiations with the candidate so that expectations on both sides are clear and fair, acceptance by the candidate should also proceed smoothly. As soon as possible after the board elects the new head, the president should call to confirm formally his or her appointment, and a formal signed contract or letter of appointment should immediately be sent, signed, and returned.

### Notifying Other Candidates

**A**s soon as the head-elect has accepted the appointment, the search committee chair or the chair of the board should call the other finalist(s) to let them know. It is helpful and thoughtful to follow these calls with a letter, thanking the candidate for his or her interest, reiterating the strengths that attracted you and, if desired, offering to serve as a reference for the candidate in the future. Remember that every candidate will have an impression and opinion of your school, which he or she will probably share with others in the profession. To the extent that they believe themselves to have been treated fairly and courteously, candidates will provide positive public relations in the independent school community. Candidates should be asked to delay releasing the information about the appointment until the school's own constituency has been informed.

### Public announcement of the appointment should be made as soon as possible after the board's decision.

Public announcement of the appointment should be made as soon as possible after the board's decision and should be coordinated with the head-elect's current school, so that the announcements are simultaneous. It is very important that the school's constituency be informed about the appointment directly from the school, rather than hearing about it through the media.

### Announcements to the School Community

**T**he first members of the school community to be told about the appointment of a new head should be the faculty and then the students. This should be done in separate meetings at the school by the chair of the board or the search committee chair, as soon as possible after the decision is final. Parents, alumni/ae and all others on the school's mailing list should be informed of the appointment by a letter from the chair of the board. Such a mailing can be prepared in advance so that it can be sent at the same time that the announcement is made to the faculty and students. The letter should include a brief biography of the head-elect, and thanks to the search committee for its work. If plans have already been made for the school community to meet the new head, these can also be announced in the letter. The search committee chair may wish to use this letter, with a brief cover note, to inform and thank candidates other than the finalists, as well as others who have been helpful in the search.

### Public Announcements

**F**inally, a press release should be prepared for local papers and whatever other media the school has access to; this should be timed to arrive as soon as possible after the school's own family has been notified, never before. Opportunities for the media to interview the head-elect can be offered, usually after he or she takes office. Most of this can be handled by the school's public relations / development office, although some schools hire outside help, too, to derive maximum publicity benefit from the appointment of a new head.

# Toward a Successful Transition

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s trustees we are ominously warned by publications, consultants, and independent school gurus that selecting a new head is the single most critical responsibility a board ever faces. This book offers excellent information and step-by-step guidelines on conducting the search process itself. It describes a thorough and sophisticated selection process, but our work hardly ends there. As vital, absorbing, and intense as the search process is, the next phase of the work begins the same day the new head's contract is signed. If we are truly committed to the long-term success of our appointments, and if we wish our heads to deliver on the hopes we project onto them, trustees need to learn to manage all phases of the executive transition systematically and intelligently. This chapter, then, is written especially for those charged with overseeing leadership changes, trustees and board presidents in particular. Its content reflects personal experience as a trustee, search committee chair and board president, the results of a survey of NAIS heads for whom 1990-91 was their first year of transition, and extensive reading in the field of leadership and organizational change.

The not-for-profit world suffers from poor transitions. Board members of a school with a long-tenured head are the least likely to have experience with leadership successions. For many trustees this may be a one-time experience, a task to be learned on the job and for which we are often ill-prepared. Traditionally, boards have paid surprisingly little attention to leadership succession issues. Relief at finally hiring someone often results in too rapid disengagement when the new executive arrives, and too little thought is given to managing that critical period when he or she takes charge.

The average tenure of leaders in a variety of organizations is decreasing, and independent schools are no exception. Through the 1950s, over 20 percent of our school heads had been in office for 20 years or more; today only a handful can claim such longevity. Turnover in heads occurs in some 15 percent of NAIS member schools each year. The leadership of independent schools today has new subtleties, stresses and demands. While the reasons for such high casualty rates are many and complex, carefully managed transitions aimed at strengthening the bonds of attachment early in the game can and will make a difference. If our selection process has in fact produced the winning combination and brought to our school its ideal head, what can we do to promote a successful board/ head partnership? Getting off to a healthy start can certainly help.

### **Preparing Positively for Change**

**F**irst, it is essential that we accept two very basic rules of life: that change is inevitable and that, even under the best of circumstances, people will invariably resist change. Executive transitions are stressful moments in the life cycles of organizations. Many lives are touched as a school faces a change of head; anxieties and uncertainties are bound to increase dramatically among students, faculty, parents, alumni, and even the greater community at large. The board should not only be alert and sensitive to such feelings, but set an example by itself facing change with equanimity, confidence, and hope.

**It may take one or even two years for students, parents, and faculty to accept and fully embrace a leadership change. Many will need time to work through the loss of the previous head.**

The effects of leadership change can be positive if viewed as occasions to renew, to look back and look ahead, to reorder priorities, to import new values and ideas, to preview future choices, to assess mission and to infuse the school with purpose and energy. If sincerely embraced and projected by the board, this positive attitude toward change will become contagious and quickly filter down to all constituencies.

The success of your school's transition process will depend on how it is handled by the board and many other parties involved; yet no single individual will play a more significant role than the board president. It is imperative, and only fair, that any candidate know with whom he or she will be working. As you initiate your search process, know who the board president will

be for at least the new head's first two years in office. If at all possible, the chair of the search committee should be or become the next board president. The quality of the relationship between the incoming head and the board president is perhaps the most crucial factor in the success formula. The board president must be sincerely committed to the new head, have a vested interest in his or her long-term success, be willing to invest time and energy to ensure it, and stand unwavering in support.

Be patient and give yourselves time. Maintain a long planning horizon and do not be too impatient to get any organizational changes underway immediately. It may take one or even two years for students, parents, and faculty to accept and fully embrace a leadership change. Many will need time to work through the loss of the previous head. Battling with a predecessor's shadow and winning those inextricably linked to the former head may prove a slow process. The new head, board, and staff will need time to develop an understanding of one another's expectations, adapt to a different style, and evolve effective working relationships. Transition is a process and process implies gradual change and growth over time. What follows is a blueprint of sorts, containing detailed suggestions for handling a transition from the day the new head's contract is signed through his or her first year in office. Use it as a menu from which to select what is comfortable and best suits your particular situation. Your own special history, budget, circumstance, and personal style will all help shape your school's transition. You have a significant stake in the personal and professional well-being of the new head. Your every effort to ascertain a smooth transition will prove the wisest investment you can make in the institution entrusted to you.

### Paving the Way

**A** successful, well-managed transition requires careful planning and organization, attention to detail, and a considerable time investment. Depending on personal style and situation, your board president may wish to establish an *ad hoc* transition committee to shoulder the responsibility and spread the work.

Members who might be considered to serve are the board president, one or two trustees from the search committee who might have bonded with the candidate during the process, the parents association president, a faculty member from each of your school's divisions, the marketing / public relations officer, the alumni association president, and the student body president. If you choose to follow this route, select and convene the committee as soon as the new head's contract is signed.

Brainstorm and chart a course of action with timelines and individual responsibilities assigned. Agree to meet on a frequent and regular basis, especially during the first six months. Take time out to profile your new head to determine his or her specific needs. A married head with two young children will require different treatment from a single head; a cross-country move differs from a neighboring city relocation and a first time head may need more attention than a 15-year veteran.

### **Prep Time (January – June)**

**A** 1991 survey of newly appointed heads indicated that 76 percent of them were hired between January and April, with typically a July 1 starting date. While always remaining respectfully considerate of your new head's obligations to his/her old school, every effort should be made to maximize those pre-July months. The goal should be to familiarize and bond the head to the school as well and as quickly as possible. To this end, a "professional" and a "personal" package should be carefully compiled and forwarded to the new head excluding any items that may have been provided during the search process.

The professional packet might include:

- School's current mission/philosophy statement
- Long-range plan
- Most recent evaluation summary
- Latest auditor's annual report
- Budget for the current and upcoming fiscal year
- School's history
- Brochures and fact sheets used by your admissions office
- Most recent yearbook
- Board minutes and motions for the past year
- Annual meeting minutes for the past 3-5 years
- Student and faculty handbooks
- Rolodex or index cards matching individual faculty /staff photos to names, division, area and years of service to the school
- Recent newspaper clippings about the school.

For the personal package (which you might mail to the new head's home for the whole family to enjoy), you may wish to consider the following:

- Maps
- Brochures describing the community's points of interest (zoos, museums, recreational facilities, etc.). The local visitors and convention bureau is the ideal one-stop source for these
- Some publications of the local chamber of commerce about the community (including economic bulletins, employment statistics, school systems, demographics, etc.)
- A copy of the latest community newspaper and/or magazine (you may wish to provide a mail subscription to one of these)
- A select list of realtors (if needed)
- A list of recommended general and specialty doctors (including dentists, orthodontists, pediatricians, ophthalmologists, ob-gyns, etc.) so that all medical records can be transferred in advance
- Any necessary insurance transfer paperwork (ask your school's business manager)
- Travel books showcasing the community
- Department of Motor Vehicles study book and applications for license and registration transfers
- Membership information about local health/country/sports clubs
- An insider's "best around town" list (everything from the freshest cinnamon rolls to quality cleaners to cheapest video rentals)
- A list of available summer programs for youngsters (age-appropriate for the head's family).

### Steps to Begin the New Relationship

**P**erhaps nothing will serve better to reduce transition anxieties and build bridges than several visits by the new head before school lets out in June. Make every effort to engage the departing head in planning these visits, but understand that a certain amount of tension is natural. Two- or three-day trips, two if possible, provide opportunities to orchestrate some or all the following:

- Individual interviews with every school employee
- Full faculty meeting(s)
- Meeting(s) with department chairs
- Meeting(s) with the departing head
- Meeting(s) with the business manager
- A detailed, all-campus tour(s) with the grounds supervisor
- A social dinner with the administrative team
- A meeting with the board's executive committee
- A meeting with the board's finance committee
- Individual interviews with each trustee
- A social reception with the trustees and their spouses
- A meeting with the parents association president
- An evening assembly with the entire parent body
- Student assemblies with each division
- Screening interviews with any "to-be-hired" candidates.

### Making the Visits Welcoming

**F**rom scheduling interviews and a comfortable room in which to conduct them, to reserving restaurants, to arranging appropriate refreshments and seating for the various functions, these whirlwind visits require careful planning and attention to detail. The transition team should develop an hour-by-hour plan, think through all logistical details, and delegate assignments as needed to trustees, staff, parents, and so on. Thoughtful gestures such as a fruit basket and welcome note in the head's hotel room or personal pickup at and delivery to the airport reflect added graciousness and goodwill.

Matters of redecorating the head's residence or office should also be attended to during these trips. If the school does not provide a residence, then additional time must be allotted for house hunting.

### Consideration for Spouse and Family

**T**he head's spouse should be included not only to preview homes, but to investigate employment or community service opportunities for themselves and school options for their children. Trustees should be encouraged to open professional doors to the spouse, whenever possible. The transition committee should find out in advance what the spouse's major concerns and interests are. The spouse's needs and schedules should be as carefully attended to as the head's.

### Goals and Evaluation

**O**ne of the board's most important responsibilities is establishing goals and evaluating the head's performance. This task gains added significance when a new leader assumes the helm. Almost as soon as he or she is hired, the board and head should work in concert to develop a set of specific, measurable goals for the following year and a clear evaluation procedure. Both should be well-understood, embraced and formally approved by the new head and the board. Formalizing all policies, processes and procedures becomes keenly important during times of transition.

### The Departing Head

**A** word of caution. The months after which a new head has been hired may prove difficult for the departing head as the school begins to focus on the upcoming transition and sets its sights toward the new leadership. It is important to remember that until the day he or she leaves, your school remains the incumbent's domain and every effort must be made to respect, acknowledge and openly appreciate his or her position. Sensitivity and diplomacy up to the very last minute are essential, humane and fair. The transition team might also take on the task of orchestrating celebrations, gestures of appreciation and concern for the departing head and family. Equal sensitivity should be demonstrated towards the departing head's assistant whose primary responsibility and loyalty remain with the outgoing head. He or she becomes singularly indispensable during a transition year and will require special attention to adjust to different work and personality styles.

**Arrival! (July – September)**

**M**any things can be done to facilitate moving day and the first few weeks of acclimatization for the newcomers. First impressions are lasting and every effort to extend a genuine welcome will pay off. Always remember that the head will be far better able to handle the professional transition if all is happy and quiet on the home front. Since it is most likely that the new head will be arriving around July, and some of the school's constituency

**First impressions are lasting and every effort to extend a genuine welcome will pay off.**

may not be around during the summer, make sure to firm up plans and details before school lets out. First on the personal and then on the professional side, here are some suggestions to consider:

- Whether rented or purchased, new or remodeled, the head's or the school's, make sure that the residence is actually in move-in condition on the family's anticipated arrival date.
- Have students prepare welcome banners, signs, posters, or windsocks and hang these around the house and in the head's office.
- Delegate a house-warming function to each constituency: a floor plant from the alumni, a basket of local treats from the parents association, a fridge or pantry stock of first-day essentials from the faculty, gift certificates for neighboring family restaurants from the board – anything that facilitates the first few days of settling in.
- Arrange for members of the maintenance or grounds staff to assist with unloading, unpacking, furniture placement, or whatever else may be helpful.
- Set up for a picnic basket, pizza, Chinese food, Mexican fare or whatever is convenient to be delivered at dinnertime on moving day. Everyone may be too tired to go out that night, but likely to be hungry and happy not to hassle through cartons of Tupperware, dishes, and pans.
- Arrange for the local welcome wagon organization to visit shortly after moving day to provide valuable tips, coupons, gifts, and practical information.
- Identify one of the trustees or parents from the head's corresponding place of worship and have that person accompany the newcomers to their first service for a personal introduction.
- Assign two or three "buddies" of the same age to each of the head's children and arrange for a welcome call and playdate soon after arrival.
- Prepare a packet of brochures describing local activities and attractions for children including extra-curricular classes, sports opportunities and summer programs.
- If younger children are in the picture, provide names, numbers, and references of reliable babysitters.
- If a school car is provided, have it serviced, cleaned, and available upon the head's arrival.

- Designate the faculty member of the transition committee to help organize one or several informal parties in which the new head and faculty can get acquainted in a relaxed, off-campus setting before classes resume in the fall (make sure to include all employees, not just teachers).
- The administrative team in particular will need to work closely with the new head upon arrival; make sure that vacation schedules are worked out so that everyone is available when needed.
- If the school typically holds a faculty orientation workshop before the opening of school, suggest special sessions and activities to acquaint and bond the new head and faculty. A quiet, off-campus overnight retreat might be ideal to launch a transition year.

### September... and Beyond

**P**lanning and briefing can minimize avoidable errors. School is back in session and everyone is watching the new head. From the style of his or her clothes to the famous lines he or she quotes at the first assembly, all eyes are in sharp focus and ears finely tuned. Everyone seems equally interested in trustee/head interaction. In a new leader's first few weeks, even trivial issues are quickly spun into theories and first impressions are made which powerfully and often permanently shape the head's image. Because there are so many pressing issues, the head's earliest actions may be the least likely to be well thought through, are often misinterpreted, and may influence people's early attitudes.

Constant, honest communication between the board president and new head are critically important during this time. While you are probably dealing with a seasoned professional, the new head is navigating through uncharted waters. You, however, know the territory; for a time the

**Research in organizational change suggests that the critical variable in effective leadership is the quality of key relationships among top executives.**

board president must wear the political antenna, help set the compass, foresee the vortices and not allow the head to stumble unnecessarily or get burnt with hot potatoes thrown by any constituency. Share everything that might help the head make a balanced decision; heads are often prisoners of the information they receive. Discuss any disagreements in private and resolve together to work through the conflicts that inevitably accompany change. Always keep the big picture in mind when little problems come up. Expect and prepare for rough sailing, but maintain a confident posture of support at all times. Be enthusiastic and publicly affirm the leader the board has selected at every opportunity. Build up a reservoir of goodwill to see the board through the difficult times that will inevitably occur.

### The Board/Head Partnership

**E**very executive transition is marked by a honeymoon period, but a leader is new for only so long. Remember that any change, no matter how small, is likely to be met with anxiety, apprehension and resistance. Resistance is an exercise of personal power in which some may choose to engage until the threat of change subsides and the new order becomes easier to accept. Each decision the new head makes will likely meet with disfavor from one or another constituency. Over time, these dissatisfied segments may grow and form blocking coalitions, united in their opposition to the new head. A board can minimize this likelihood by clearly articulating its priorities for the school and the new head.

Given the peculiar nature of schools as institutions, heads are constantly in danger of becoming everybody's target. The main agenda of the board during a transition year must consist of guiding, supporting, and publicly affirming confidence in the leadership of the new head.

Precisely because the board/head relationship is so vital to a successful transition, the board may want to invest in a well-facilitated retreat in which to review trustee/head roles, responsibilities, mutual expectations, and both short- and long-term goals for each. NAIS's annual "Leadership through Partnership" conference for heads and board presidents is a must. Research in organizational change suggests that the critical variable in effective leadership is the quality of key relationships among top executives. In an independent school, the relation between trustees and the head emerges as vital. On an ongoing basis, both must strive to build a partnership of mutual endeavor, trust, and respect in which to communicate openly and work cooperatively. Flexible accommodation and understanding of their interdependent roles require constant education and definition, especially during a leadership change.

### Some Public Relations Possibilities

**L**eadership changes create positive public relations opportunities for the school. Plan a campaign to introduce the new head to the greater community; consider the media, principals and heads of other schools, presidents and deans of colleges and universities, service organizations such as Kiwanis, Rotary, Lions and Optimists, and any other groups or institutions that may be significant in your area. Whenever possible at least one trustee and the school's public relations officer should accompany the head.

### Ongoing Support

**F**inally, encourage trustees, especially the board president, to provide the new head with a healthy dose of tender loving care. The head's job is always demanding, lonely, and intensely punishing; the pressures of transition can take their toll on the most experienced of veterans. Believe that a little attention can go a long way to mitigate stress and that every friendly gesture from the trustees is also an act of great wisdom. It is often the little things that mean the most, so consider expressing support through some of the following:

- In addition to a standing weekly meeting, take the head off campus for a tennis match, jog, or walk in a restful setting. Allow him or her to break the routine, exercise, and unload.
- Know when the head's birthday is and plan a celebration; be as simple or as extravagant as might be fitting.
- Acknowledge the head with a card or small gift at selected holidays. Even on the shortest budget you can find simple gifts that have special significance and say that trustees care.
- Prepare a scrapbook of the first full year's events to present as an end-of-year thank you gift in June.
- After a particularly stressful week or event, rent a hilarious comedy from your nearest video store or provide tickets to a local comedy club. Howling is great medicine.
- Find a reason to genuinely compliment the head often: for the outcome of a project, for displaying a sense of humor, for handling a thorny situation, for playing catch with the second graders at dismissal... anything. Just affirm that you noticed him or her doing something good. Legitimate, specific, and timely praise is the glue of great working relationships.
- Spoil him/her with a baked treat, breakfast or mid-afternoon snack (depending on what time you may be coming on campus for a meeting or event).
- Break the mid-semester routine by arranging a getaway weekend for the head and spouse/friend – a fishing, hiking or skiing adventure, a sojourn at a charming old-world inn. A respite even a few miles away from home can have amazing restorative powers.
- Always be there when the chips are down. Listen, help, affirm, hug. Learn to read the head's voice over the phone and pay a personal visit when you perceive it's needed.
- Give a simple, inexpensive gift on unexpected days – a funny balloon, seasonal plant, comic book, lollipop, or whimsical card.
- Write a note acknowledging any job well done.
- Provide tickets for sporting/cultural events.
- Arrange for a haircut, massage, aerobic class or sauna – anything that relaxes, soothes, and relieves stress.



- Send flowers. They are a centuries-old expression of appreciation and affection.
- Arrange a family barbecue, a Chinese banquet in your home at which everyone cooks, a dinner at an exotic restaurant. Relax, have fun and occasionally break bread together.

**Your extra effort will offset the unavoidable travails of what may sometimes appear to be the world's most difficult job.**

- Turn the tables and let him/her be a kid for a day with passes to a local carousel and ice cream shop gift certificate.
- Mark a special occasion by planting a tree, adopting an animal or donating to a charity in the head's name.
- Make time available for the head to attend retreats and meetings where heads get together and share war stories.

Sounds like royal treatment fit for a king or queen? Absolutely! Sounds like an overwhelmingly taxing demand from your already overloaded schedule? Right again! But your extra effort will offset the unavoidable travails of what may sometimes appear to be the world's most difficult job. These are only suggestions for you to adapt according to the needs and personality of your own situation. Regardless of how much or how little you choose to undertake, the board will soon realize that the new head's personal adjustment and well-being are directly linked to professional performance. Your commitment to facilitate the transition is an insurance policy aimed at the good health of the school. There is no period more critical to the life of a school, or any organization, than that in which it selects and adjusts to new leadership. Transition is passage, it is movement; it is not permanent. What the board is doing is building a bridge with strong, dependable foundations for the long-term betterment of the school. This is a noble pursuit worthy of your best efforts.

# What I Wish I'd Known Before I Chaired the Search Committee

By Betsy Michel

*"I wish someone had told me that the search would take over my life."*

*"The search was hard work. Don't think that it's easy or something that just happens to a school."*

*"In retrospect, I suppose there is a lot that I wish I had known. On the other hand ... if I had known it all, I might not have taken the job."*

## A Larger View of the Search Process



From the outset, the search for a new head of school must be viewed as one piece of the longer and larger process

of a school's evolution from one stage to the next. The process begins when the need to appoint a new head is first recognized, and does not end until the new head is firmly ensconced in the job.

The search for a new head provides a board with a fresh and obvious opportunity – and obligation – to reexamine the recent history and the inner workings of its school, and in preparing a description of expectations, to reaffirm or redefine the school's mission and its future. What are the school's distinguishing qualities? How would you characterize its culture? Do not be lulled into thinking that just any good "school person" will

fit the bill. There are many fine school heads, but not all will share your board's vision for the school or be attuned to its uniqueness. The question to be asked is not simply "Can this person do the job?" but also "Is this candidate the right person for this job at this school at this time?" So often search chairs will remark that although there was no dearth of qualified candidates, in the end there was only one choice.

### **The Integrity of the Process**

**D**o not minimize the importance of the integrity of the process. As you learned in math class years ago, the process by which a problem is solved is as important as getting the right answer. The process speaks worlds about the school to the candidate and to the constituency. It legitimizes the ultimate selection.

Build the involvement of teachers, students, parents, and graduates – let them own a piece of the search too. Listen to everyone. Ask questions. You will learn more about your school during the search than in all your previous years as a trustee. A good listener will define the school's leadership requirements from a variety of perspectives and, as the search progresses, see the candidates through many lenses. To the extent that the process is understood, respected, and shared by the several constituencies, the committee builds a mutual investment in the person selected – and in the ups and downs that may occur throughout the transition and thereafter.

### **The Roles and Tasks of Chair, Committee, and Consultant**

**C**hairing a search is a BIG job. Meetings with consultants, faculty, students, parents, trustees, the committee – and, yes, finally, candidates – go on throughout the search. A search may require some travel – particularly if the search is for the head of a boarding school and the committee members and candidates do not all live nearby. The correspondence and attendant paperwork both during the search and after the appointment is voluminous – much more than one person can expect to do well without some assistance whether from a consultant, other volunteers, or staff. Telephone time is endless.

### **You will learn more about your school during the search than in all your previous years as a trustee.**

Although many schools will elect to engage a consultant, you don't have to rely entirely on the consultant to present suitable candidates or check references. Build your own network too, defining and coordinating efforts with your consultant. Call around to heads of other schools and last year's search committee chairs and ask for suggestions. You will be surprised at how helpful school people are and at how quickly you will discover a sense of shared purpose with someone you barely know or even a total stranger.

### The Importance of References

**D**o not rely on a consultant for all your reference checking and do not limit yourself to the candidate's reference list. Some reference calls can and should be shared by members of the search committee. Different people will pick up a speaker's observations and shades of nuance differently. (How often one listens only for what one chooses to hear!) On the other hand, some search committee chairs say they were reluctant to diffuse the work among too many committee members. Scattered, isolated conversations make it more difficult to discern the patterns in what is said and not said. Listen for what a colleague or friend neglects to say or is reluctant to share. And follow up – if someone leads off with the words "Of course I never paid any attention to the rumors..." do not fail to ask for an explanation.

Once a candidacy is public, it is acceptable to solicit feedback and encourage inquiry – but control the rampant enthusiasm of volunteer assistance. A public candidacy should not signal open season on the prospective head. There is a balance to be struck. The committee wants to know, and is entitled to know, as much as it can and never should be in the position of hearing someone say later: "I was surprised... if only you had called... I could have told you..." Find a middle ground between diligence and restraint.

Do not be shy. Be bold, but be sensitive too. Respect the need for and commitment to confidentiality. The independent school world is infinitely smaller than one can imagine.

Be sure to let the consultant help with the calls a trustee cannot make. Some people speak more freely with a consultant. Secure in their anonymity, they will share insights with a professional who is not directly connected to the school and who will not be there months later to remind them, even in silence, of what was shared. Some questions – How interested is the candidate in the school? What kind of salary should be considered? – may provoke varying interpretations depending on who asks the question. If you are working with a consultant, share the process. Identifying candidates is only one element of a consultant's services; you will need and benefit from his or her professional participation, counsel and feedback on many related issues.

### The site visit is important because it may be the only opportunity to observe the candidate "at home."

If time and distance permit, make a site visit. Don't take the whole committee and do be discreet; site visits will generate curiosity in the candidate's school and can be disruptive. Be cautious in pressing colleagues or students for additional information. The site visit is important because it may be the only opportunity to observe the candidate "at home." Visit a class, walk around the campus together, eat a meal in the school dining hall. Those observations may be telling.

### Preparing for a Strong Head/Board Relationship

**B**e honest with the candidates. If there are problems that the school faces, share the board's concern. It is not fair to surprise a newly installed head with the disclosure of a significant deficit, irksome rift in the faculty, or pending lawsuit. More important, the committee will want to assess how the candidate might handle a potentially damaging situation. It is a natural tendency to accentuate the positive when trying to hire a new head, but the board needs to know that the new head is cognizant of and will not be daunted by any problems that may seem imminent.

Do not neglect the candidate's family. Your school may be looking for a new head, but in many cases the job will require transplanting more than one person. A spouse's job and children's schools will be issues of importance. If there are expectations for the spouse's participation in school life, discuss them early in the search. For many families, the school will be the first and most important introduction to a new community. How we treat issues of importance to the families of candidates tells much about the kind of community we may ask them to join.

### A Long-Term View of the Decision

**D**o not be afraid to make a difficult, painful, and perhaps scary decision. Do not rush or take a shortcut if slowing down or even taking what may seem to be a risk means getting it right. The difficulties and hurt of getting it wrong are in the long run more costly and far more draining than a short-term setback.

A search is not just time-consuming. Be prepared for its taking a toll of emotional energy as well – from the committee and the school, as well as from the candidates. Skills and experience are part of the job description; so too are vision, values, and character. In selecting the head of a school that we may have attended or that our children attend, we are making decisions that in one way or another connect to profound feelings about our own lives and the future. The assessment of the school's needs and a candidate's qualifications necessarily accelerates the establishment of relationships among the committee members and with candidates that in other circumstances evolve over a period of years. Uncertainty about the school's future and heightened anticipation in the weeks preceding the final decision will be wearing. Do not underestimate the intensity of the search and be prepared for some letdown at its conclusion.

And then do not quit. The transition is not over when the appointment is made or even after the new head has moved into the old office and rearranged the furniture. That rearrangement is only a precursor of more significant change, and

**A search for a new head of school requires a significant commitment from all participants and conscious strategies for dealing with its multiple, often unexpected demands.**

may in some cases signal trouble. The transition is not finished until the new head is firmly fixed at the helm, and that may take weeks, months, or even years depending on the school and the circumstances. Do not let the committee scatter too quickly. An important part of the trustees' support for a new head is the institutional memory of why the appointment was made in the first place.

Those are some of the things I learned during the search and wish I had known sooner and better. A search for a new head of school is a complex process. It requires a significant commitment from all participants and conscious strategies for dealing with its multiple, often unexpected demands – on the search committee, the candidates and the school.

What I could not have known before the search and will remember best was expressed by one of our committee members at its conclusion:

*"I took on the assignment because I love the school. I believe in the school and I thought it was the most important contribution I could make. I did not know at the time the degree to which that belief would be strengthened. I could not have imagined the support I would feel from the school's constituencies – teachers, trustees, students. And I would never have guessed that I would make and cherish ten new best friends. It was an opportunity for the school, not a chore for the trustees. I was the winner. It was worth every minute."*

National Association of Independent Schools

## Principles of Good Practice for Member Schools

## A P P E N D I X A

### School Search Committees and Search Consultants

**T**he following principles of good practice are designed to help search committees as they embark upon the task of selecting a school head. Each school must decide for itself whether it will retain a consultant to help with the search. If the school does decide to engage professional counsel, the same principles should be observed.

#### Search Committee

1. The board and search committee should devise a search process that is viewed as fair, orderly, and cost-effective by all parts of the school community.
2. The search committee should actively solicit the names of the best available candidates drawn from a broad candidate group without regard to age, race, religion, gender, or national origin unless the school has a religious mission that requires the head to have a particular religious affiliation.

3. The search committee should see pertinent materials related to any and all candidates, including applications that come from outside the consultant's regular network.
4. The search committee should recognize the sensitivity of visits by trustees to a candidate's present school. The consultant should work with the search committee and candidate to see that such visits are complete and thorough yet at no time jeopardize the relation of the candidate to his or her present school. School visits should be made only when the candidate and search committee are at a mutually serious stage.
5. The search committee should exercise the greatest sensitivity with candidates who are not selected, recognizing their investment of time and emotional energy and respecting their professional reputation and relationships.
4. The consultant should limit searches during any given period to a number that will assure service of high quality to each client school.
5. The search consultant should make a reasonable effort to understand the school, its mission, its culture, and the nature of the position to be filled.
6. The school, not the individual candidate, should always be the client.
7. Both consultant and search committee should check the candidate's references with great care. The consultant is responsible for presenting a candidate for consideration by the search committee and for emphasizing the committee's responsibility after that time.
8. The consultant should respect the confidentiality of each candidacy and impress upon both search committee and candidates the importance of discretion. Any candidate now a head who is seriously exploring other school headships should so inform his or her current board chair in confidence.

### Search Consultants

1. The prospective consultant should provide the search committee with a complete list of schools recently served (including the names and telephone numbers of references).
2. In outlining procedures to the search committee, the consultant should provide a full written description of services offered, including expenses and fees. In the case of a consulting firm, the search committee should be told which person in the firm will do the search and should interview that person prior to any contracting for services.
3. The consultant should make known the names of other schools for which he or she is actively performing a search for persons to fill a similar position.
9. The consultant should keep the search committee fully informed about the progress of the assignment throughout the search and ensure that each candidate is informed fully and promptly about the status of his or her candidacy.
10. The consultant should refrain from inviting the head of a school placed in that position by the consultant's firm within the past five years to become a candidate for the client school.
11. No consultant or any member of the consultant's firm should be a candidate for a position in which the consultant is conducting a search.

## A P P E N D I X B

## The Letter That Begins the Transition

## BLUE HILLS ACADEMY

487 Williston Road  
Charlestown, SC 29403

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May 15, 1992

To Friends of Blue Hills Academy:

*It is with some sadness that I formally announce that our head of twenty-three years, Anthony Williams, will retire at the end of the 1993-94 school year. With his customary graciousness, Mr. Williams wanted to provide us with ample time to begin our search for the new head of Blue Hills Academy. Mr. and Mrs. Williams will rejoin their families in the Midwest but they will have left much for us to remember.*

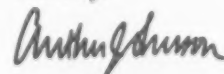
*Foremost among Mr. Williams' visible legacies are the library complex and the environmental studies program, gardens and greenhouse/laboratory. We shall continue to benefit from his priority on rekindling acquaintance-ships with former alumni and friends.*

*For much of the Academy's life as a pre-primary to middle school, it has been ably led by Anthony Williams. His involvement in many civic organizations in the Blue Hills Valley has brought credit to our school. Most of all we shall miss his consistent attention to the Blue Hills community, which has made it a caring and nurturing community where students are able to discover, stretch and grow - knowing what is expected and how to seek guidance. We thank Anthony and Martha for their years of service to Blue Hills Academy and the community, and hope they will return to visit us often.*

*We plan a series of events to honor the Williams family in the next months and hope you will join us. If you have suggestions, please do let me know. The board will be forming a search committee and will welcome your participation in this process as well.*

*We shall enjoy looking back on accomplishments and ahead to new challenges.*

Sincerely,



Arthur Johnson  
President, Board of Trustees

## A P P E N D I X

## C Programs and People Today

**Description of the School, its Goals, its Challenges, and the Role of the Next Head****Blue Hills Academy****History**

**B**lue Hills Academy was established in 1815, seven years after the incorporation of the town of Blue Hills. Its mission was to provide secondary education for boys and girls in Blue Hills and the surrounding towns. The first classroom facilities were built in 1821 on the present 43-acre site in the Blue Hills Valley. Buildings were slowly added to round out the campus life; many remain, converted to new uses. Newer buildings blend into the campus setting.

For most of the 20th century, Blue Hills Academy provided a college preparatory education. It has served a population of day students beginning with a class of 12 students at its founding, which grew to an average 150 students until the 1970s. With the opening of a regional public secondary school in 1930, the Academy broadened its scope to offer entrance at the seventh grade. As the population in the area grew, demand for independent primary education provided an opportunity to which the Academy responded by adding a lower school in 1960. In 1965, the board of Blue Hills Academy determined to concentrate on pre-primary, primary education and the middle school years.

**E**ducation at Blue Hills follows a developmental approach that strives to educate the whole child and inspire a lifelong joy in learning. The academic program is designed to promote intellectual growth, artistic and intellectual creativity, an understanding of many cultures, and responsibility within the school community.

The Academy uses themes to integrate material from different subject areas. The themes are chosen to address issues at developmentally appropriate levels and are reinforced and reintroduced as the students mature.

As a visitor to the Academy, one is impressed by groups of students intent upon their work. Whether in classrooms, hallways, or common areas, students are absorbed in their work and not distracted by visitors. Classrooms and hallways provide exhibit space for carefully displayed student work.

In the 1992-93 year there are 181 students at the Academy. Students come from Blue Hills itself and seven surrounding communities. Most graduates attend day or boarding independent secondary schools.

There are 32 faculty at the Academy, more than half of whom have master's degrees. In pre-K through grade 5, each classroom has 20 or fewer students and a senior teacher and teacher assistant. There are 17 teachers in the middle school grades 6 through 8. Art, music, dance, drama, foreign language and physical education teachers work with all grade levels. Every year, each of the middle school classes participates in an off-campus learning and living activity as an extension of the school's environmental education program.

Primary and middle school directors are faculty mentors responsible for an integrated curriculum within their grade levels and for coordination between the primary and middle schools. Anthony Williams is the current head of the school and has announced his retirement at the end of the 1992-93 school year.

Mr. Williams has guided Blue Hills for 23 years. He headed a successful capital campaign for the new library, computer and media center completed in 1984, and brought the annual fund from just over \$70,000 to \$174,000 last year. His personal interest in the environment was the impetus for the Academy's developing a new program that uses the school property as a basis for ecosystem study. The environmental program has received \$90,000 in foundation grants in the last three years.

In 1992, there are 22 trustees. Members of the board serve for a term of five years and no more than two consecutive terms without a one year retirement. The full board of trustees meets four times a year. The executive committee of the board, which consists of six members, meets monthly. The committees of the board meet at least four times a year and additionally as needed.

The annual budget of Blue Hills Academy is just over \$2 million and the school has an endowment of approximately \$3 million. Income is derived from tuition, endowment fund, annual fund, and other fees and gifts.

Blue Hills Academy has made a strong commitment to financial aid and allocates almost 14 percent of its budget to it. Awards range from \$1,500 to almost full tuition; approximately 48 students received financial aid last year.

## Future Goals

**B**lue Hills Academy has begun a strategic planning process and has identified the following broad goals:

- **Academics**
  - Continue to integrate environmental studies.
  - Begin to develop a more multicultural view.
  - Increase faculty salaries and opportunities for faculty development.
  - Develop incentives in support of excellence in teaching.
  - Encourage analysis of learning styles and discussions of teaching methods to support them.
- **Fundraising**
  - To provide a new classroom building for the middle school, to renovate the Chapel building and upper athletic field.
- **Enrollment**
  - To strengthen the admissions effort to increase the student body to 215 students by 1995; next year's goal is 195. (Fundraising and enrollment are clearly linked. Often, facilities are a factor for students and their families.)
- **Board**
  - Seek individuals with particular expertise and resources for new openings.
  - Review opportunities for board development.

Blue Hills Academy has also begun a multicultural assessment following the guidelines of NAIS (the National Association of Independent Schools). In 1993-94, Blue Hills Academy will begin its self-study in preparation for the 10-year accreditation review by the State Association of Independent Schools (SAIS). This will provide a unique opportunity for the Academy and its new head to engage in comprehensive dialogues to revisit, reexamine and rearticulate the mission and the programs to see how well the Academy is meeting its goals.

Each board of trustees and each head of Blue Hills Academy has faced challenges posed by events and circumstances of the times. Their responses to those challenges have helped to shape the school today. Today, the school is ready to understand new challenges, new questions and to build upon its traditions to meet the needs of children, today and tomorrow.

#### **Future Challenges for Blue Hills Academy**

**A** major strength of the school is its small and nurturing community. The issues of concern to the Academy are related to those strengths. How does a small community reach out to, and reflect, the larger community? How do traditions blend with new perspectives? What is the meaning of diversity for this school?

How does the faculty manage current needs and ongoing questions? How does a small community nourish its faculty and administrators? How does the curriculum of a small school balance the teaching of core skills and the enrichment needs of all its children? How does a school continue to evaluate its programs to assure that students do well in their next educational setting? In difficult economic times, how will the community prioritize its needs?

These are only some of the questions reflected in multiple community meetings held to gather the input of all constituencies in the planning of this transition. This is a small, caring and concerned community and those meetings have helped to shape future dialogues and to provide direction. Because the questions are difficult and the answers are complex, this will be a continuing dialogue within the Academy community.

#### **The Role of the Next Head**

**T**he role of the next head is to orchestrate that dialogue, with the flexibility to encourage the rearticulation and commitment to a vision that brings together the Academy's values and its goals. That requires a head's vision of what constitutes academic excellence, an understanding of how children and faculty flourish in schools, a sensitivity to this community and the ability to make conclusions a reality.

Today, heads of schools must balance many demands, multiple issues and many constituencies – board, faculty, administrative staff, students, parents, alumni and potential donors. The head of Blue Hills Academy must balance the leadership role on the campus with the necessary external leadership role as a representative of the school. We are looking for an individual with sensitivity and successful experience in guiding an independent school in the diverse areas that constitute the school's goals.

This is a school with a long history and a tradition that includes adaptability and innovation that its leaders recognized as appropriate for the times. How Blue Hills Academy will respond as it develops its academic program further, faces a more competitive enrollment era, and builds its diversity in student body, faculty, administration and on the board, will depend on the sensitive leadership of its next head. A thoughtful search process is the Academy's first step in framing the dialogue as it defines its goals and the role of leadership in the years ahead.

A priority for many constituents, is a discussion and rearticulation of a sequential curriculum from pre-primary through the middle school. The head's role is to lead the dialogue through the self-study and continue it in faculty discussions, in forums or meetings with the parents and in faculty development opportunities.

Many see the potential for Blue Hills Academy to be a recognized educational leader in New England. Others have expressed the desire to build better bridges with the community. The key is academic excellence. As Blue Hills Academy works to improve an already fine academic program, it has the opportunity to work with the public schools in the area. Providing ongoing forums to discuss children's learning presents the opportunity to engage in dialogues with visiting educational thinkers and leaders and to be a catalyst for discussions of academic excellence in the Valley.

Blue Hills Academy has a long history and a strong and committed community to serve as foundations for developing the next phase of its potential. Ideally the next head will lead the community in those energetic dialogues that will serve naturally to maintain and develop the vitality and the visibility of the school.

### Experience Required

**W**hile this person may not have been a head of school, he or she will need to have had significant leadership roles in independent or public school education. He or she should be an educator with a strong academic background, committed to academic excellence, to the role of arts and athletics, the development of social responsibility, and diversity in the community all of which are part of the Academy's mission. A candidate's experience should include accomplishments in strengthening or developing programs in these areas.

Blue Hills Academy seeks a head of school who understands and has experience in pre-primary through middle school education. The ideal candidates will be knowledgeable about children's development, curriculum, and faculty development and evaluation. We expect that finalists can point to leadership in raising a faculty's understanding in those areas and concrete examples of the results in learning and teaching. We value candidates with a track record of inspiring communities to become excited about education.

Ideal candidates will have managed multiple areas in addition to providing educational leadership. We expect that candidates will have been involved in fundraising, marketing, admissions, and finance in some capacity that provided knowledge, expertise, or experience.

A P P E N D I X D

A Sample Advertisement

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**Head of School  
Blue Hills Academy**

Blue Hills Academy in Maple Grove, Connecticut, is seeking a new head to begin in the 1993-94 school year. Blue Hills, a pre-K through grade 8, coed day school with 181 students, has a developmental program designed to promote intellectual growth, artistic and intellectual creativity, an understanding of many cultures, and responsibility within the school community.

The Academy is looking for a new head with experience in pre-primary through middle school education who will build upon the strong foundations here. He or she will be knowledgeable about children's development, curriculum, and faculty development and evaluation. Past experience must include a significant leadership role that motivated an educational institution to strengthen multiple areas of school life. Development and admissions experience are desirable since Blue Hills Academy has plans to improve its middle school facilities and to enroll a larger number of students.

*Please send applications to:*

Arthur Johnson, President, Board of Trustees,  
Blue Hills Academy, Maple Grove, CT

Blue Hills Academy is an equal opportunity employer.

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## A P P E N D I X E

**A Sample Schedule for Candidate Visits****Day One:**

Candidate is met by a member of the search committee and taken to hotel or home where he/she will be housed. Final schedule is given.

**7:00 pm:** Dinner with small group of 2-3 search committee members.

**Day Two:**

**7:30 am:** Breakfast with another small group from the committee, one of whom will then take candidate to the school.

**9:00 am:** Tour of the campus with one or two members of the school staff.

**10-12:00 pm:** At 30-45 minute intervals, meetings with: 1) Each division head 2) Business manager 3) Director of development 4) Director of admissions (afternoon continuation as needed)

**12:00 pm:** Break

**12:30 pm:** Lunch with upper school student council

**1:30 pm:** Continued schedule of meetings with selected administrators

**3:30 pm:** Meeting with faculty committee

**5:00 pm:** Time as needed

**7:00 pm:** Dinner with either full committee or another small group.

**Day Three:**

**7:30 am:** Breakfast with small group of the committee or with representatives from the parents and alumni associations.

**8:30 am:** Meeting with the head of the school

**10-12:00 pm:** On campus meeting with other personnel or students. Candidate may ask to see specific persons or groups.

**12:00 pm:** Lunch with faculty (Department heads)

**1:30-3:00 pm:** Candidate in faculty lounge to meet informally with faculty and staff

**3:00-3:15 pm:** Break

**3:15-5:00 pm:** Meeting with search committee or other members of the board of trustees

**6:00 pm:** If this is the final visit, social hour with members of the board of trustees. If not, the search committee member accompanies candidate to the airport or hotel.

## A P P E N D I X F

### The Interim Head Search Process

**T**he time frame for an interim head search is usually short. That person will ordinarily head the school for just one year but that can be a significant time. Clearly all the steps described in the comprehensive search process are not necessary nor is there likely the appropriate time. However, some key elements are relevant.

If your school is fortunate to have a senior administrator willing and able to step into the role this will abbreviate a part of your work. It will be just as important to establish clear goals and priorities for the one year period. The board's understanding of where an interim head will need the most help is critical to the success of the year.

If there will be an external search, many of the same principles of a full search apply. The chapters on identifying candidates (7), checking references (9), and interviewing candidates (10) provide critical information for making the right choice. Helping the interim head understand the school, providing support, and clear goals and priorities are elements of board responsibility during the interim period.

## A P P E N D I X G

### Governance Through Partnership

**G**overnance Through Partnership is an NAIS initiative, funded by a grant from the Esther A. and Joseph Klingenstein Foundation, to promote effective governing procedures at schools. Its objective is to assist in forging a strong working partnership between the board and the school. NAIS has prepared programs and materials for use by boards when they are

reviewing their procedures. A group of experienced trustees and heads has been trained to present these programs and facilitate the ensuing discussions. NAIS is resolved to provide these services to schools at the minimum cost. For further information contact the NAIS Department of Administrative Services.

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